

Bulk Quoting with Coalition

Coalition makes it easy for you to quote cyber insurance for your entire upcoming renewal book, creating a friction-free process for cross-selling cyber to all clients. We are able to provide bulk quotations for a minimum of 50 clients.

The bulk quotation process is straightforward. With 5 standard pieces of info (name, revenue, industry, address, and website), we can generate bindable quotations that you can present alongside other policies for a great new business opportunity. Many brokers readily export this basic info from their agency management system and generate quotes for their upcoming month's renewals and drive revenue.

Below we outline the four steps in this process – selecting coverages and limits, providing client data, Coalition underwriting, and providing finalized quotations.



01 Broker selects coverages

Prior to beginning the bulk quotation process, we ask brokers to select the coverages and limits they could like to provide to their clients. We ask brokers to indicate:

- **Requested package**
We offer three core packages through our platform, which are outlined in Appendix A. Please note that these packages can be tailored to meet your coverage or pricing requirements.
- **Overall policy limit and sublimit**
We can offer as low as \$25,000 and up to \$10M in aggregate limits.
- **Individual coverage sublimits and retentions (as appropriate).**
- **Broker account**
The account on the Coalition dashboard where you would like all quotations to be sent.

02 Broker provides client data

We request a few pieces of information about each client in order to provide bulk quotes. Coalition provides an Excel template for you to easily organize this information. Where possible, we have provided drop-down options to make the process easier for you.

Some of this information is required in order for us to provide quotations. The required information includes:

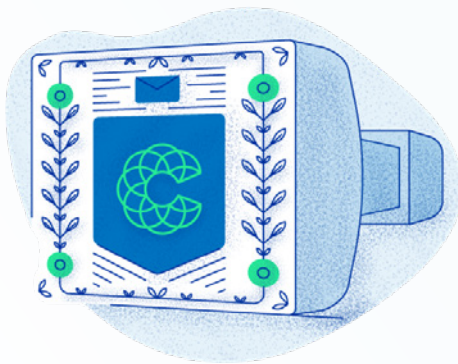
- Company name
- Revenue
- Industry
- Website
- Address

Note: please separate the first and second address lines. For example, for the address "123 Main Street, Suite 10", place "123 Main Street" in the "Street Address Line 1" column, and "Suite 10" in the "Street Address Line 2" column.

We request other information that is not required, but enables us to provide a more accurate quotation for your client. This information includes:

- Employee count (range)
- Insured's email
- Business type (renewal or new business)
- Notes
- Security questions from our submission form (e.g., "Does Named Insured require dual control when transferring funds in excess of \$25,000?")

We request that you provide this information in the provided Excel template.



03 Coalition underwrites

Once we receive your requested coverages and client data, Coalition begins the underwriting process. Our underwriting process includes a technology scan of an insured's network and web properties. Through this process, we gather tens of thousands of data points about the company's cyber security to identify any issues or potential weaknesses.

In some circumstances, a quotation may require further review. When this happens, we may require some additional information from the broker or the client in order to provide a quotation.

04 Coalition provides bulk quotations back to you!

When we complete the underwriting process, including any deeper security reviews, all quotations will be available in your broker dashboard, and we will provide the Excel file back to you including the Coalition policy number and premium for each client. At this time, you may share the quotations with your clients, bind the quotation, and request additional limit and coverage options.

Thank you for your partnership. If you have any questions about the bulk quotation process, don't hesitate to contact us.

