



Policy Comparison Quick Start Guide



December 2017

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Introduction

Scope and Purpose

Advisen's Policy Comparison solution takes the painstaking manual work out of lining up policy forms by provision for the purpose of comparing terms and conditions.

Our policy form library currently consists of almost 5,000 unique policy forms, over 5,500 endorsements, and is built almost entirely from client submissions.

Creating a Policy Form Comparison

Process

1. Log into Advisen.com and select the Policy Comparisons option from the Advisen toolbar.

The screenshot shows the Advisen.com user interface. At the top, there is a navigation bar with a "Logout" link, a "Jump to:" dropdown menu set to "<Please Select an Analytic>", and several icons including a folder, a "NEW ADV" badge, and a globe. Below this is a horizontal toolbar with tabs for "My Advisen", "Prospecting & Peer Groups", "Underwriting Framework", "Benchmarking", "Loss Analysis", "Policy Comparisons" (which is highlighted with a red box), "Policy & Program Mgmt", "Research", and "News". A help icon (?) is also present.

Below the toolbar, the main content area is divided into two columns. The left column, titled "You are in: Front Page News", contains a "Front Page News" section with several news items, each with a link and a date. The right column, titled "Policy Comparisons", contains a list of policy types and a table of dates.

Policy Type	Date
Advanced	
Crime	
Cyber-Technology	
Directors & Officers	
Employment Practices	
Environmental	November 21, 2016
Excess/Follow Form	
Fiduciary Liability	November 20, 2016
General Liability	
Medical Malpractice	
Property	
Umbrella/Excess	
Errors & Omissions (E&O)	November 19, 2016
All	
Accountants	
Construction-Related	
Financial	November 21, 2016
Lawyers	
Media	

2. Select the appropriate line of business from the dropdown.

The screenshot shows the ADVISEN website interface. At the top, there is a navigation bar with tabs: My Advisen, Prospecting & Peer Groups, Underwriting Framework, Benchmarking, Loss Analysis, Policy Comparisons (selected), Policy & Program Mgmt, Research, and News. Below the navigation bar, there is a section titled 'You are in: Front Page News' with icons for various news categories. The 'Front Page News' section displays several news items, including 'Up to \$3.5 billion in insured losses from New Zealand quake: AIR ADVISEN' and 'Record 5.8 Pawnee earthquake prompts more than 285 insurance claims'. On the right side, there is a dropdown menu for 'Policy Comparisons' with the following options: Advanced, Crime, Cyber-Technology, Directors & Officers (highlighted with a red box), Employment Practices, Environmental, Excess/Follow Form, Fiduciary Liability, General Liability, Medical Malpractice, Property, Umbrella/Excess, Errors & Omissions (E&O), All, Accountants, Construction-Related, Financial, Lawyers, and Media. The 'Directors & Officers' option is highlighted in orange.

3. Select the forms you wish to compare from the Policy form drop-down boxes and select your desired Policy Form Topic(s).

The screenshot shows the 'Directors & Officers Policy Comparisons' form. At the top, there are three buttons: 'Compare more than 2 policies', 'Show Comparison', and 'Save Lookup'. Below these buttons, there are two sections for selecting policy forms. The first section, 'Policy Form 1', has a dropdown menu with 'AIG Not-For-Profit Protector 68467 (8/97)' selected. The second section, 'Policy Form 2', has a dropdown menu with 'StarStone Specialty Private Company Management Liability Insurance SSS-MPL-ML-GTC (12-15)' selected. Below these sections, there is a 'Policy Form Topic(s)' dropdown menu with the following options: 'Definitions: Claim, Suit', 'Definitions: Coverage, Coverage Section, Policy', 'Definitions: Employee', and 'Definitions: Event, Incident, Demand'. The 'Definitions: Employee' option is highlighted in blue. At the bottom, there is a section for 'Include Endorsements' with radio buttons for 'Yes' and 'No'. The 'No' radio button is selected. A note states: '*Selecting 'Yes' will allow you to compare available Endorsements based on your Form (s) and Topic(s) selection. Policies highlighted in the dropdown menu have available Endorsements.' At the bottom, there are two buttons: 'Show Comparison' and 'Save Lookup'.

*Policy forms highlighted in yellow contain endorsements that are available for comparison within Advisen.com

**Policy forms labeled NEW are new to Advisen and not necessarily a new policy form

***Date of creation can usually be found at the end of the form's title.

- a. To include any endorsements, click the YES button in "Include Endorsements" and select any endorsements that you wish to compare from the Policy Endorsement.
- b. Click the Show Comparison button to show the results.

Policy Form 1
AIG Not-For-Profit Protector 68467 (8/97)

Policy Form 2
StarStone Specialty Private Company Management Liability Insurance SSS-MPL-ML-GTC (12-15)

Policy Form Topic(s)
Definitions: Claim, Suit
Definitions: Coverage, Coverage Section, Policy
Definitions: Employee
Definitions: Event, Incident, Demand

Include Endorsements ☒ Yes ☐ No *Selecting 'Yes' will allow you to compare available Endorsements based on your Form(s) and Topic(s) selection. Policies highlighted in the dropdown menu have available Endorsements.

Policy 1 Endorsement(s)
AIG McGowan Condominium / Cooperative / Homeowners Association Amendatory

Policy 2 Endorsement(s)
StarStone Deletion of Independent Contractor Coverage SSS-MPL-ML-END-CW-406 (12-15)

Show Comparison **Save Lookup**

Results		
AIG Not-For-Profit Protector 68467 (8/97)	Topic	StarStone Specialty Private Company Management Liability Insurance SSS-MPL-ML-GTC (12-15)
No Definition	Definitions: Coverage , Coverage Section , Policy	MANAGEMENT LIABILITY - PART - COMMON DEFINITIONS - COVERAGE PART means, individually or collectively, the following coverage parts, if purchased, as specified in Item 5 of the Declarations: 1. Directors & Officers Coverage (Part 1) 2. Employment Practices Coverage (Part 2) 3. Fiduciary Coverage (Part 3)
- "EMPLOYEE(S)" means any past, present or future employee of the Organization, whether such employee is in a supervisory, co-worker or subordinate position or otherwise, including any full time, part-time, seasonal and temporary Employee of the Organization in his or her capacity as such.	Definitions: Employee	MANAGEMENT LIABILITY - PART - COMMON DEFINITIONS - EMPLOYEE means any natural person whose labor or service is engaged by and directed by the Company and is on the payroll of the Company, including any full-time, part-time, and seasonal worker. Employee shall also mean a temporary worker, leased worker, independent contractor, committee member or volunteer for the Company solely with respect to conduct within the scope of his or her duties on behalf of the Company.

4. Click a topic that you would like to compare.

- "EMPLOYEE(S)" means any past, present or future employee of the Organization, whether such employee is in a supervisory, co-worker or subordinate position or otherwise, including any full time, part-time, seasonal and temporary Employee of the Organization in his or her capacity as such.	Definitions: Employee	MANAGEMENT LIABILITY - PART - COMMON DEFINITIONS - EMPLOYEE means any natural person whose labor or service is engaged by and directed by the Company and is on the payroll of the Company, including any full-time, part-time, and seasonal worker. Employee shall also mean a temporary worker, leased worker, independent contractor, committee member or volunteer for the Company solely with respect to conduct within the scope of his or her duties on behalf of the Company.
--	--	--


5. The resulting list will show the chosen topic language across all policies within that line of business.
 - a. Click the "Return to Policy Comparison View" button or select from the Topic dropdown menu to compare more topics.

Directors & Officers Policy Comparisons

Compare more than 2 policies


Topic

Definitions: Employee ▼



Show Comparison

Return to Policy Comparison View



Advisen's policy library contains over 4,000 policies and continues to grow. In addition, we have recently expanded Policy Comparison to include endorsements. If you have a policy or endorsement form that you want included or if you are looking for a hard copy of a policy or endorsement, please click the link below:

[Request a Policy or Endorsement](#) or email policies@advisen.com

Results

<p>*NEW (10/20) QBE The Solution for Private Company Directors & Officers and Entity Liability Coverage Part QBBP-1000 (05-14), General Terms and Conditions QBBP-1004 (11-14)</p>	<p>GENERAL TERMS AND CONDITIONS QBBP-1004 (11-14)</p> <p>- EMPLOYEE means any natural person whose labor or service was, is or will be engaged and directed by a Company, including a part-time, seasonal, leased and temporary employee, intern or volunteer. Employee does not include an independent contractor.</p>
<p>*NEW (10/20) StarStone Specialty Private Company Management Liability Insurance SSS-MPL-ML-GTC (12-15)</p>	<p>MANAGEMENT LIABILITY - PART - COMMON DEFINITIONS</p> <p>- EMPLOYEE means any natural person whose labor or service is engaged by and directed by the Company and is on the payroll of the Company, including any full-time, part-time, and seasonal worker. Employee shall also mean a temporary worker, leased worker, independent contractor, committee member or volunteer for the Company solely with respect to conduct within the scope of his or her duties on behalf of the Company.</p>

6. To export your Policy Comparison, click the Microsoft Word icon located at the box below the Advisen toolbar. If the Word icon or Excel icon is not highlighted with colors, then that means you are not currently at an appropriate point where results can be exported. Please revisit previous steps to evaluate what steps need to be taken to export results.



***If we are missing a policy form that you would like to compare in our system, please [follow these steps](#).

Comparing more than two Policy Forms

1. Perform the [above steps](#) 1 and 2
2. Click on the 'Compare more than 2 policies' button.

Logout | Reset Password | Jump to: <Please Select an Analytic>

My Advisen | Prospecting & Peer Groups | Underwriting Framework | Benchmarking | Loss Analysis | Policy Comparisons | Policy & Program Mgmt | Research | News

You are in: [Home](#) > Directors & Officers Policy Comparisons

Directors & Officers Policy Comparisons

Compare more than 2 policies | Show Comparison | Save Lookup

Policy Form 1
<Please Select>

Policy Form 2
<Please Select>

- a. Another way of getting into this function is to hover the 'Policy Comparisons' tab and click 'Advanced'.

My Advisen | Prospecting & Peer Groups | Underwriting Framework | Benchmarking | Loss Analysis | Policy Comparisons | Policy & Program Mgmt | Research | News

You are in: [Home](#) > Front Page News

Policy Comparisons
Advanced
Crime
Cyber-Technology
Directors & Officers
Employment Practices
Environmental
Excess/Follow Form
Fiduciary Liability
General Liability
Medical Malpractice
Property
Umbrella/Excess

[\[Quick Search List\]](#) [\[Update User Memberships\]](#) [\[Sales Administration\]](#) [\[Vendor Usage Reports\]](#) [\[Report Vendors\]](#) [\[Cache Manager\]](#) [\[Front Page\]](#) [\[User View Report\]](#) [\[Template Loader\]](#) [\[Notification\]](#) [\[Company Watch List\]](#) [\[Menu Permissions\]](#) [\[Request a Report\]](#) [\[Password Change Report\]](#) [\[Casu\]](#) [\[Debt Issuance & Pricing\]](#) [\[Chart Samples\]](#) [\[Travelers_PCL\]](#) [\[NavPro Unde\]](#) [\[Investment Reports\]](#) [\[Ship View Report\]](#) [\[ates Projects\]](#) [\[Quick View Analysis\]](#)

3. Under LOB/Insurer tab, select the coverage and the line of business you want to compare.
 - a. Click on the 'Select a Coverage' dropdown

Clear All [Request a Policy or Endorsement](#)

1. FIND policies & topics that meet your criteria. 2. SELECT policies & topics to compare. 3. DISPLAY Comparison.

LOB/Insurer Content Location Policies Found Topics Found View

Find Policies Matching:
At least one search filter (OR)

LOBs Select a Coverage
All Coverages

Add
Remove
Remove All

Your Selections
All

- b. Select the line of business and click the 'Add' button to move the LOB to the 'Your Selection' box.

1. FIND policies & topics that meet your criteria. 2. SELECT policies & topics to compare. 3. DISPLAY Comparison.

LOB/Insurer Content Location Policies Found Topics Found View

Find Policies Matching:
At least one search filter

LOBs Select a Coverage
All Coverages
Cyber/Tech Risk
Fidelity, Surety & Crime Liability
Management Liability
Medical Malpractice
Professional Liability
Property

D&O Side-A
Employment Practices
Fiduciary Liability
General Partners Liability
Mutual Fund D&O/E&O
Public Officials Liability

Add
Remove
Remove All

Your Selections
Directors & Officers Liability

- Go to 'Policies Found' tab and select the line of business in the 'Show Policies Matching...' drop-down menu.
- Select the policies you want to compare and click 'Add' button to move your selection to the 'Your Selections' box.

The screenshot displays the 'Policy Comparison Quick Start Guide' interface. It features three main tabs: '1. FIND policies & topics that meet your criteria.', '2. SELECT policies & topics to compare.', and '3. DISPLAY Comparison.' The 'Policies Found' tab is selected and highlighted with a red box. Below the tabs, there are three sub-tabs: 'LOB/Insurer', 'Content', and 'Location'. The 'Policies Found' sub-tab is also highlighted with a red box. Under the 'Policies Found' sub-tab, there is a 'Comparison Type:' section with three radio buttons: 'Multiple Topics, Short-Form Policy (10 policy maximum)' (selected), 'Multiple Topics, Long-Form Policy (3 policy maximum)', and 'Single Topic (any number of policies)'. To the right of this section is a 'Show Comparison' button. Below the 'Comparison Type:' section is a 'Show Policies Matching...' dropdown menu, which is highlighted with a red box and shows 'Directors & Officers Liability' selected. Below the dropdown is a list of policies, including 'OneBeacon Managed Care Organizations Directors', 'OneBeacon Management and Professional Liability', 'OneBeacon Not-For-Profit Organization Manageme', 'OneBeacon Private Company Management Liability', 'Onebeacon Management Liability Form No. G1622!', 'PIA Private Equity Professional and Management L', 'Philadelphia D&O Flexi Plus PI-DF-1 (7/95)', 'Philadelphia Directors & Officers Protection Flexi Pl', 'Philadelphia Executive Safeguard PI-ES-1560 (12/9', 'Philadelphia FLEXI PLUS FIVE Not-For-Profit Orga', 'Philadelphia FLEXIPLUS FIVE Not-For-Profit Orgar', 'Philadelphia Indemnity FLEXIPLUS FIVE Not-For-P', 'Philadelphia Private Company Protection Plus PI-PI', 'Progressive D&O Company Liability Insurance Polik', 'Progressive D&O Form No. 3247 (5-99)', 'Progressive Directors & Officers Liability Policy For', 'Protective Specialty Non Profit Management Liabilit', 'QBE Accountants' Professional Combined Policy P', 'QBE Accountants' Professional Combined Policy P', 'QBE Architects' & Engineers' Professional Combine', 'QBE Australia Directors & Officers Liability Insuranc', and 'QBE DO-02'. Below the list of policies are three buttons: 'Add', 'Remove', and 'Remove All'. The 'Add' button is highlighted with a red box and has a red arrow pointing to the 'Your Selections' box. The 'Your Selections' box contains three items: 'ACE Advantage Corp D&O PF-14759 (10/28/03)', 'CNA Not-For-Profit Organization/Association Professio', and 'QBE Accountants Professional Liability Combined Insu'. The 'Your Selections' box also has a scroll bar at the bottom.

- Click the 'Topics Found' tab and click the 'View' tab to load the policies.

1. FIND policies & topics that meet your criteria.			2. SELECT policies & topics to compare.		3. DISPLAY Comparison
LOB/Insurer	Content	Location	Policies Found	Topics Found	View
Hints: To jump to a word or phrase: Press CTRL-F. To request that a policy be sent to you by email: click its name at the top of the column.					
ACE Advantage Corp D&O PF-14759 (10/28/03)			CNA Not-For-Profit Organization/Association Professional Liability Policy G-20717-A (ED. 2/94)		QBE Accountants Professional Liability Policy G-20717-A (ED. 2/94)
1. Form Title; Preamble			1. Form Title; Preamble		1. Form Title; Preamble
Directors & Officers Liability Original comparison template. Topic not available.			Directors & Officers Liability NOT-FOR-PROFIT ORGANIZATION/ASSOCIATION PROFESSIONAL LIABILITY POLICY THIS IS A CLAIMS-MADE POLICY AND, SUBJECT TO ITS PROVISIONS, APPLIES ONLY TO ANY "CLAIM" FIRST MADE AGAINST THE INSURED DURING THE POLICY PERIOD. NO COVERAGE EXISTS FOR CLAIMS FIRST MADE AFTER THE END OF THE POLICY PERIOD UNLESS, AND TO THE EXTENT, THE EXTENDED REPORTING PERIOD APPLIES. DEFENSE COSTS REDUCE THE LIMIT OF LIABILITY AND ARE SUBJECT TO RETENTION AMOUNTS. PLEASE REVIEW THE POLICY CAREFULLY AND DISCUSS THE COVERAGE WITH YOUR INSURANCE AGENT OR BROKER. In consideration of the payment of the premium and in reliance upon all statements made and information furnished to the Insurer designated in the Declarations, a stock insurance corporation, hereafter called the "Insurer", including the statements made in the Application, and subject to the provisions of this Policy, the Insurer agrees that:		Accounting Firm OUR AGREEMENT IN - This agreement This policy is between The statement of fact, attached endorsement insurance. It is a legal Words in bold type face than in the headings, s meanings attached to and interpretation sect Cyber OUR AGREEMENT IN - This agreement This policy is between The statement of fact, attached endorsement insurance. It is a legal Words in bold type face than in the headings, s

7. Click the download button to export in Word or Excel format.

You are in: Advanced Policy Comparison

[Clear All](#)
[Request a Policy or Endorsement](#)

1. FIND policies & topics that meet your criteria.			2. SELECT policies & topics to compare.		3. DISPLAY Comparison
LOB/Insurer	Content	Location	Policies Found	Topics Found	View
Hints: To jump to a word or phrase: Press CTRL-F. To request that a policy be sent to you by email: click its name at the top of the column.					
ACE Advantage Corp D&O PF-14759 (10/28/03)			CNA Not-For-Profit Organization/Association Professional Liability Policy G-20717-A (ED. 2/94)		QBE Accountants Professional Liability Policy G-20717-A (ED. 2/94)
1. Form Title; Preamble			1. Form Title; Preamble		1. Form Title; Preamble
Directors & Officers Liability Original comparison template. Topic not available.			Directors & Officers Liability NOT-FOR-PROFIT ORGANIZATION/ASSOCIATION PROFESSIONAL LIABILITY POLICY THIS IS A CLAIMS-MADE POLICY AND, SUBJECT TO ITS PROVISIONS, APPLIES ONLY TO ANY "CLAIM" FIRST MADE AGAINST THE INSURED DURING THE POLICY PERIOD. NO COVERAGE EXISTS FOR CLAIMS FIRST MADE AFTER THE END OF THE POLICY PERIOD UNLESS, AND TO THE EXTENT, THE EXTENDED REPORTING PERIOD APPLIES. DEFENSE COSTS REDUCE THE LIMIT OF LIABILITY AND ARE SUBJECT TO RETENTION AMOUNTS. PLEASE REVIEW THE POLICY CAREFULLY AND DISCUSS THE COVERAGE WITH YOUR INSURANCE AGENT OR BROKER. In consideration of the payment of the premium and in reliance upon all statements made and information furnished to the Insurer designated in the Declarations, a stock insurance corporation, hereafter called the "Insurer", including the statements made in the Application, and subject to the provisions of this Policy, the Insurer agrees that:		Accounting Firm OUR AGREEMENT IN - This agreement This policy is between The statement of fact, attached endorsement insurance. It is a legal Words in bold type face than in the headings, s meanings attached to and interpretation sect

If you would like to drill down your forms in a more detailed way, you can use the other filters in searching/loading multiple policy forms. Follow the steps below:

1. Perform the above [steps 1, 2 and 3](#).
2. After selecting the line of business, select the 'Insurance Companies'

Insurance Companies A I I A B C D E F G H I J K L M
N O P Q R S T U V W X Y Z

AIG Metropolitana Compania de Seguros y Reasue
AIG Mexico Compania De Seguros De Vida Sa De
AIG Mexico Seguros Interamericana
AIG Personal Lines Group
AIG Poland Insurance Company S.a
AIG Property Casualty Company
AIG Russia Insurance Company
AIG South Africa Limited
AIG Star Life Insurance Co., Ltd.
AIG Union Y Desarrollo, S.a.

Add
Remove
Remove All

Your Selections
AIG Personal Lines Pool
AIG Specialty Insurance Company

3. Choose the content you would like to include in the 'Content' tab

1. FIND policies & topics that meet your criteria. 2. SELECT policies & topics to compare. 3. DISPLAY Comparison.

LOB/Insurer **Content** Location Policies Found Topics Found View

Find Policies Matching: At least one search filter (OR) **Show Policies Found**

Keywords:

Subjects
Computers, EDP
Coverage Territory
Employment Practices
Errors and Omissions
Fraud, Dishonesty
Other Insurance
Personal Injury
Punitive Damages

Add
Remove
Remove All

Your Selections
Advertising Injury
Defense Costs
Pollution
Terrorism, War

4. Select the demographics in the 'Location' tab

1. FIND policies & topics that meet your criteria.

2. SELECT policies & topics to compare.

3. DISPLAY Comparison.

LOB/Insurer **Content** **Location** **Policies Found** **Topics Found** **View**

Disclaimer:
The country(ies) identified are for classification purposes only. Location classification does not recognize policy provisions relating to where suits or claims must be brought. Policy wording should be referred to for actual territory provisions.

Find Policies Matching: At least one search filter (OR) **Show Policies Found**

U.S. States

- Arizona
- California
- Colorado
- Connecticut
- Delaware
- District of Columbia
- Florida
- Georgia
- Hawaii
- Idaho
- Illinois
- Iowa

Add
Remove
Remove All

Your Selections

- Arkansas
- Indiana
- Maryland
- Oklahoma
- Utah

Countries

- Afghanistan
- Albania
- Algeria
- American Samoa
- Andorra
- Angola
- Anguilla
- Antarctica
- Antigua
- Argentina

Add
Remove
Remove All

Your Selections

- none

5. Click the 'Policies Found' tab to load the forms based on your filters

1. FIND policies & topics that meet your criteria.

2. SELECT policies & topics to compare.

3. DISPLAY Comparison.

LOB/Insurer **Content** **Location** **Policies Found** **Topics Found** **View**

Comparison Type:

- ☒ Multiple Topics, Short-Form Policy (10 policy maximum)
- ☐ Multiple Topics, Long-Form Policy (3 policy maximum)
- ☐ Single Topic (any number of policies)

Show Comparison

Show Policies Matching...

Policies **Directors & Officers Liability**

- Allied World National Executive Forcefield Side A Direc
- Allied World Side A Directors & Officers Excess and Le
- Allied World Side A Directors & Officers Excess and Le
- Allied World Side A Directors & Officers Excess and Le

Add
Remove
Remove All

Your Selections

- Allied World Excess Side A D&O Lead DIC (1/04)
- Allied World Side A Directors & Officers Excess and Le

6. Click the 'Topics Found' tab to drill down the items you want to include in your form.


7. Click the 'View' tab to display your final report

*Always move your selection from either left or right box to select/deselect filters by using the 'Add' and 'Remove' buttons.

**Use more filters as much as possible to narrow down the result. This will help you to easily determine the policy forms you need.

8. Click the download button to export in Word or Excel format

You are in: Advanced Policy Comparison



[Clear All](#)
[Request a Policy or Endorsement](#)

1. FIND policies & topics that meet your criteria.			2. SELECT policies & topics to compare.		3. DISPLAY Comparison.
LOB/Insurer	Content	Location	Policies Found	Topics Found	View
Hints: To jump to a word or phrase: Press CTRL-F. To request that a policy be sent to you by email: click its name at the top of the column.					
Allied World Excess Side A D&O Lead DIC (1/04)			Allied World National Executive Forcefield Side A Directors & Officers Excess and Lead Difference-In-Conditions (DIC)		Allied World Side Difference-In-Conditions
Insurance Policy DO 00032 00 (06/09)					
1. Form Title; Preamble			1. Form Title; Preamble		1. Form Title; Preamble
D&O Side-A Original comparison template. Topic not available.			Directors & Officers Liability In consideration of the payment of the premium and in reliance upon the Application, ALLIED WORLD NATIONAL ASSURANCE COMPANY, herein called the "Insurer", agrees as follows:		Directors & Officers Liability Original comparison template. Topic not available.
Directors & Officers Liability Original comparison template. Topic not available.					Employment Practices Liability Insurance Original comparison template. Topic not available.
2A. Insuring Agreement			2A. Insuring Agreement		2A. Insuring Agreement

Requesting Actual or Missing Policy Forms

Advisen also provides the actual policy forms as well as loads missing policy forms into Advisen.com.

There are multiple ways in requesting policy forms.

1. You can directly send a request to policies@advisen.com and indicate the forms you want to obtain or attach the form you want to be loaded to Advisen.com.
2. When you are in the Policy Comparison page, scroll down to the bottom of the page and click on the 'Request a Policy or Endorsement' link and a dialog box will appear.

Date First Entered or Last Modified

Policy Comparison Template Version Used

Types of Risks

Include Endorsements

☒ Yes ☐ No

*Selecting "Yes" will allow you to compare available Endorsements based on your Form(s) and Topic(s) selection. Policies highlighted in the dropdown menu have available Endorsements.

Policy 1 Endorsement(s)

Policy 2 Endorsement(s)

Show Comparison

Save Lookup

Advisen's policy library contains over 4,000 policies and continues to grow. In addition, we have recently expanded Policy Comparison to include endorsements. If you have a policy or endorsement form that you want included or if you are looking for a hard copy of a policy or endorsement, please click the link below:

[Request a Policy or Endorsement](#) or email policies@advisen.com

a. Member Information

- i. These fields are automatically populated based on your Advisen.com profile.

Member Information	
▶ First Name :	James
▶ Last Name:	Smith
▶ E-mail Address:	james.smith@abccorp.net
▶ Business Phone:	(555) 555-5555

b. Describe Your Request – this is where you specify your request.

- i. Choose a Topic
 - Auto-populated
- ii. Request
 - Add a Policy or Endorsement
 - Click this radio button and upload the form you want to load into Advisen.com

Describe Your Request	
▶ Choose a Topic:	Request a Policy and Endorsement ▼
▶ Request:	
<input checked="" type="radio"/> Add a Policy or Endorsement:	
Attach a File:	<input type="button" value="Upload File"/>
<input type="radio"/> Request PDF Copy of Policy or Endorsement:	

- Request PDF copy of Policy or Endorsement
 - Click this radio button and specify the form you want to obtain in the 'Full Advisen Policy Form Name' box

Describe Your Request

► **Choose a Topic:** Request a Policy and Endorsement ▼

► **Request:**

☐ Add a Policy or Endorsement:

☒ Request PDF Copy of Policy or Endorsement:

Full Advisen Policy Form Name:

- Additional Notes:
 - Notate your comments/notes in the box provided.
- Once you're done, click on the 'Go' button.
 - An e-mail will be automatically sent to policies@advisen.com.

► **Additional Notes:**

3. Another way in requesting an actual policy form is when you have already [compared more than two policy forms](#).

a. Click on the form name and a dialog box will appear

The screenshot shows the Policy Comparison tool interface. At the top, there are icons for home, email, print, save, and help. Below these is a "Clear All" button and a link "Request a Policy or Endorsement". The interface is divided into three main sections: 1. FIND policies & topics that meet your criteria., 2. SELECT policies & topics to compare., and 3. DISPLAY Comparison. Section 1 has sub-sections: LOB/Insurer, Content, Location, Policies Found, Topics Found, and View. Section 2 has a "Hints:" box with instructions: "To jump to a word or phrase: Press CTRL-F." and "To request that a policy be sent to you by email: click its name at the top of the column." Section 3 has a "Highlight Text:" input field and a "Highlight" button. The table below shows three policy forms. The first entry, "ACE Advantage Corp D&O PF-14759 (10/28/03)", is highlighted with a red box. The second entry is "CNA Not-For-Profit Organization/Association Professional Liability Policy G-20717-A (ED. 2/94)". The third entry is "QBE Accountants Professional Liability Policy G-20717-A (ED. 2/94)".

1. FIND policies & topics that meet your criteria.	2. SELECT policies & topics to compare.	3. DISPLAY Comparison.
LOB/Insurer	Content	Location
Policies Found	Topics Found	View
Hints: To jump to a word or phrase: Press CTRL-F. To request that a policy be sent to you by email: click its name at the top of the column.		
Highlight Text: <input type="text"/> Highlight		
ACE Advantage Corp D&O PF-14759 (10/28/03)	CNA Not-For-Profit Organization/Association Professional Liability Policy G-20717-A (ED. 2/94)	QBE Accountants Professional Liability Policy G-20717-A (ED. 2/94)
1. Form Title; Preamble	1. Form Title; Preamble	1. Form Title; Preamble
Directors & Officers Liability Original comparison template. Topic not available.	Directors & Officers Liability NOT-FOR-PROFIT ORGANIZATION/ASSOCIATION PROFESSIONAL LIABILITY POLICY THIS IS A CLAIMS-MADE POLICY AND, SUBJECT TO ITS PROVISIONS, APPLIES ONLY TO ANY "CLAIM" FIRST MADE AGAINST THE INSURED DURING THE POLICY PERIOD. NO COVERAGE EXISTS FOR CLAIMS FIRST MADE AFTER THE END OF THE POLICY PERIOD UNLESS, AND TO THE EXTENT, THE CLAIM IS FIRST MADE AFTER THE END OF THE POLICY PERIOD.	Accounting Firm Professional Liability OUR AGREEMENT - This agreement is a contract between you and us. The statement attached endorses the terms of this insurance. It is a part of this policy.

- b. In this box, you don't have to anything here. The fields are automatically populated. All you have to do is click on the 'Submit' button

Policy Request

Member Information

First Name*:

Last Name*:

E-mail Address*: - must contain xxx@xxx.xxx

Business Phone*:

Body*:

ACE Advantage Corp D&O PF-14759 (10/28/03)

Submit