



Entering Carriers

The most reliable source for carrier information is AM Best (www.ambest.com). Using their advanced search you can locate the Parent Company, NAIC Code, addresses, phone numbers, Best Rating, etc. NAIC Codes are found for the Issuing Carriers only, if you are looking for an issuing carrier and they do not have an NAIC Code – 99% of the time the Carrier is a Parent or a Billing – not an Issuing. To confirm the issuing carrier, check the actual Dec Page of the policy.

Darwin National Assurance Company is an Issuing Carrier – the Parent is Alleghany Insurance Holdings

Best's Rating Center

View Ratings: [Financial Strength](#) [Issuer Credit](#) [Securities](#) [Advanced Search](#) Other Web Ce

Darwin National Assurance Company
 (a member of [Alleghany Insurance Holdings](#))
 A.M. Best #: 12699 NAIC #: 16624 FEIN #: 560997452
 Stock Ticker: New York Stock Exchange Arca NYSE Arca DR

Address: 9 Farm Springs Road Farmington, CT 06032
 Phone: 860-284-1300 Fax: 860-284-1301
 Web: www.darwinpro.com

Assigned to companies that have, in our opinion, an excellent ability to meet their ongoing obligations to policyholders.

Best's Ratings

Financial Strength Ratings [View Definitions](#) **Issuer Credit Ratings** [View Defini](#)

Rating: **A- (Excellent)** Long-Term: **a-**
 Affiliation Code: **g (Group)** Outlook: **Stable**

AM Best's Advanced Search gives you the option of searching by **Company Name** or by the **NAIC Code**.

Company and Ratings Search

Search A.M. Best's extensive database of life/health, property/casualty and insurance companies worldwide. Use the (?) links provided below for specific help on search filters and field definitions.

Search for Companies (?)

Text

- Company Name Starting with
- All words Containing
- All words Starting with
- Entire Word(s)

Company Number/ID

- A.M. Best Number
- A.M. Best Group Number
- NAIC Number (National Association of Insurance Commissioners)
- FEIN (Federal Employer Tax ID Number)
- AINN (Alien Insurer ID Number)



Example 1: Agency **does not** have a direct contract with Alleghany Insurance Holdings but writes business with multiple **Issuing** carriers that belong to Alleghany through third parties (GA - General Agency). Alleghany is entered as the **Parent** and all **Issuing** carriers are entered into the same group.

Look at the information displayed in **AM Best** above for Darwin National Assurance Company. Darwin National Assurance Company is a member of Alleghany Insurance Holdings, which is why in the display below, we enter **Alleghany Insurance Holdings** as the **Parent** – We do suggest adding a carrier that you don't currently have a contract to be able to list all the subsidiary carriers and also in the event you get a contract with this carrier, it will be setup correctly.

Carrier Name: Alleghany Insurance Holdings

card file | contacts | locations | carrier names | commissions

Carrier Summary [Add New]

Details	Parent	Billing	Issuing	Internal	Carriers	NAIC Code	AM Best	Remove
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Alleghany Insurance Holdings			
	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Capitol Indemnity Corporation	10472	A	
	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Darwin National Assurance Company	16624	A-	
	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Darwin Select Insurance Company	24319	A-	
	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Landmark American Insurance Company	33138	A	
	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	RSUI Indemnity Company	22314	A	

Example 2: Agency **has** a direct contract with Chubb. Chubb Group of Insurance Companies will be checked as both **Parent** and **Billing**.

Carrier Name: Chubb Group of Insurance Companies

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Carrier Summary Showing page 1 of 2 Page 1

Details	Parent	Billing	Issuing	Internal	Carriers	NAIC Code	AM Best	Remove
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Chubb Group of Insurance Companies			
	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Chubb Custom Ins Co			
	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Chubb Indemnity Co			
	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Chubb Insurance Company of Europe SE			
	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Chubb Lloyds Ins Co			

Example 3: Intermediary, GA, Third Party, E&S Market - entered all by themselves as they do not own any issuing companies. Select **Parent** and **Billing** only and they will not have a **NAIC Code**.

Carrier Name: KRM Risk Management

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Carrier Summary [Add New]

Details	Parent	Billing	Issuing	Internal	Carriers	NAIC Code	AM Best	Remove
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	KRM Risk Management			



Example 4: Agency does not have a contract with HCC Insurance Holdings but they do with Houston Casualty Company. In this case, Houston Casualty will be checked as **Billing** and **Issuing**.

Carrier Name: **HCC Insurance Holdings** Carrier

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Carrier Summary

Details	Parent	Billing	Issuing	Internal	Carriers	NAIC Code	AM Best
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	HCC Insurance Holdings		
	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Houston Casualty Company	42374	A+

Example 5: The below example shows that Acuity A Mutual Insurance Company is all three - **Parent**, **Billing** and **Issuing**. If you look this carrier up on AM Best, you will see that they're not a member of anyone. So, in this instance, they are all three and will be available for selection in the **Issuing** company and **Billing** company fields.

Carrier Name: **Acuity A Mutual Insurance Company** Carrier

card file | contacts | locations | **carrier names** | commissions

Carrier Summary [Add New]

Details	Parent	Billing	Issuing	Internal	Carriers	NAIC Code	AM Best	Remove
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Acuity A Mutual Insurance Company	14184	A+	

Note: For additional information regarding carrier setup, please refer to "Issuing and Billing Carrier Setup for Download Policies", *Tips and Facts, Vol. 4, Issue 7* in Nexsure online help.



Step 1 - Entering Carriers

1. Click on **SEARCH**, change **Entity** type to **Carrier**, type in at least two letters of carrier's name in the **Carrier** box and click **Search** (be sure to search for both the **Issuing carrier** and the **Parent carrier** to avoid entering the carrier twice.)

SEARCH RESULTS - CARRIER

33 Record(s) Found

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Details	Name	Location Type	City	St./Prov.	Zip/Postal	remove
	AllState	Accounting Office	Naperville	IL	60563	
	ALLSTATE COUNTY MUTUAL INSURANCE CO	Accounting Office	Naperville	IL	60563	
	ALLSTATE PROPERTY & CASUALTY INS CO	Accounting Office	Naperville	IL	60563	
	ALLSTATE TEXAS LLOYDS	Accounting Office	Naperville	IL	60563	
	CCM	Accounting Office	Avon	CT	06001	
	CCM	Underwriting	Avon	CT	06001	
	CCM	Underwriting	Dallas	TX	75265	
	Charter County Mutual	Accounting Office	Avon	CT	06001	
	Charter County Mutual	Underwriting	Avon	CT	06001	
	Charter County Mutual	Underwriting	Dallas	TX	75265	

[Add New Record]

Search Clear

2. Click the **[Add New Record]** link.



- Complete the **Carrier Information** screen. If the contact name is not known, click the **Add New** option, type in **Contact** in the **First Name** box and type in the carrier's name in the **Last Name** box (as in this example: United Automobile or UAIC).

Be sure to search prior to adding a carrier since only the **Parent/Billing** or first carrier within a group is added through **SEARCH**. Subsidiary carriers are added through the **carrier name** tab, by clicking the **[Add New]** link. Following this process will ensure that carriers are setup properly.

Note: Check download documentation to understand **Parent/Billing** carrier associations.

Carrier Information

Name:

NAIC Code:

Carrier Category: Intermediary Traditional *

Carrier Types: Issuing Billing Internal

Contract Year:

Website:

AM Best Rating:

Primary Location

Location Type:

Address:

City:

State:

Zip:

Country:

Intl Address Info:

Phone:

Fax:

Carrier E-mail:

Is the above the US Mail address for this location? Yes No

Primary Contact

Apply Contact: Use Existing Add New

Prefix:

First Name: * MI:

Last Name:

Suffix:

Title:

Contact Role:

E-Mail:

Phone Number(s)

Type	Number	Ext	Description
Business Phone <input style="border: 1px solid red;" type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Cell Phone <input style="border: 1px solid red;" type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Home Phone <input style="border: 1px solid red;" type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

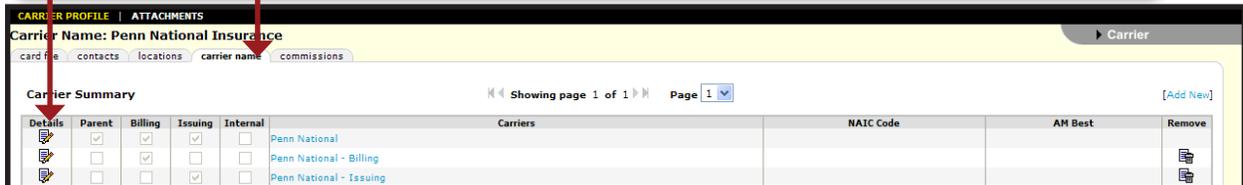


Step 2 – Carrier Association

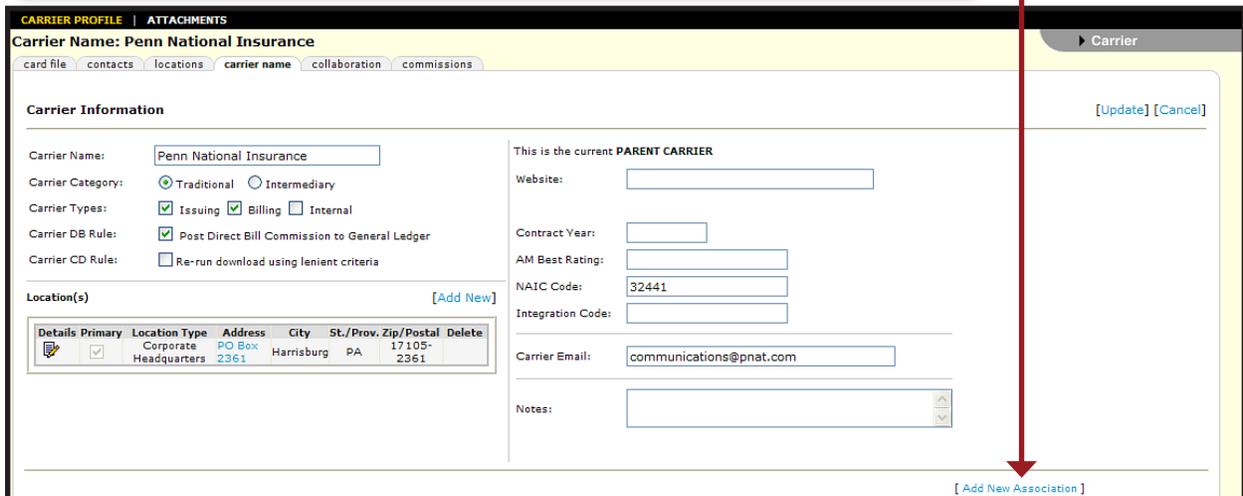
Associate Carrier to Territory and Branch from Carrier Name Tab

Carrier association may be done at the organization level, one territory at a time or on the **carrier name** tab to all or selected carriers at one time:

1. To associate carriers at the carrier level, click the **carrier name** tab and click on the **Details** icon beside the carriers name associated with the branch on the **Carrier Summary** screen.



2. Click the **[Add New Association]** link at the bottom right of the **Carrier Information** screen to add the territories and branches to associate with the carrier. This process must be done in order to select a carrier at policy level for identification, billing and accounting purposes (the carrier must be associated to the branch).





- On the **Select Territories and Branches** screen, all territories display by default. Use the **Territory** list to change the territory. Selecting the check box in the gray header selects and deselects all **Territories and Branches**.

Select Territories and Branches

Territory:

To add associations, select the check box. Once all associations are completed, click OK.

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<input type="checkbox"/>	Territory Branch	Address	City	St/Prov.	Zip/Post.	Branch Code
<input checked="" type="checkbox"/>	Southern East Coast Territory	1128 Gurnee Avenue	Anniston	AL	36201	
<input type="checkbox"/>	Insurance Agency	2200 Quintard Av	Anniston	AL	36201	<input type="text" value=""/>

Tip: To remove associations, access the entity and change the status to inactive

* required

- To select a specific branch, select the check box beside the **Territory** name and select the check box beside the **Branch**. There is a red * asterisk beside the **Branch Code** box which indicates that it must be populated to proceed with the association. After selecting all **Territories and Branches** to add associations, click the **OK** button. The association(s) has been added.

Note: If more than one page of territories and branches exist, after selecting **Territories and Branches** on the first screen, use the navigation tools to navigate to the next screen and select all needed before clicking **OK**. Following this process will add all associations without the need to click the [\[Add New Association\]](#) link more than once.



- Now added to the bottom of the **Carrier Information** screen is a collapsible display showing the associations added. Use the **Expand-Collapse**  icon to open and close this display. This portion of the screen will be closed upon accessing the carrier name detail. Once the carrier has been associated, be sure to update the zero commission line (which was added for the associated branches automatically) in this process and add other necessary commission defaults. Commission must be added for the associated carrier in order to select the carrier at policy level. For more on commission see, "Step 3 - Commission Defaults" of this document.

CARRIER PROFILE | ATTACHMENTS
Carrier

Carrier Name: **Penn National Insurance**
[Update] [Cancel]

card file | contacts | locations | **carrier name** | collaboration | commissions

Carrier Information

Carrier Name:

Carrier Category: Traditional Intermediary

Carrier Types: Issuing Billing Internal

Carrier DB Rule: Post Direct Bill Commission to General Ledger

Carrier CD Rule: Re-run download using lenient criteria

Location(s) [Add New]

Details	Primary	Location Type	Address	City	St./Prov.	Zip/Postal	Delete
	<input checked="" type="checkbox"/>	Corporate Headquarters	PO Box 2361	Harrisburg	PA	17105-2361	

This is the current **PARENT CARRIER**

Website:

Contract Year:

AM Best Rating:

NAIC Code:

Integration Code:

Carrier Email:

Notes:

[Add New Association]

Details	Status	Territory Name	Primary Contact	Description	Update by	Updated Date	Remove
	Active	Southern East Coast Territory	Donald James		Mary Oberleitner	8/3/2009 11:30:26 AM	

To associate carriers at organization level, see "Associate Carrier with a Territory at Organization Level" in the next section.



Associate Carrier with a Territory at Organization Level

Each carrier entered in Step 1 must be associated with a territory.

1. On the **Primary** menu, click **ORGANIZATION**. Click the **territories** tab and click the **Details** icon for the territory to which the carrier must be associated.

Organization Name: XDTI--Training Org 972003

Organization

territories

Details	Territories	Address	City	St./Prov.	Zip/Postal	Remove
	-Annapolis Corporate Office (9)	4479 Pontiac Lake Rd Ste 2	Waterford	IA	48328	
	1 Plus Territory 1 - AH (1)	5510 Marlboro Lane	Asheville	NC	28801	
	AAA Territory (1)	4479 Pontiac Lake Rd Ste 2	Waterford	IA	48328	

2. On the **territory** tab, click the **entity associations** tab > **carrier associations** tab.

territory

XDTI--Training Org 972003 >> Acme Region >> Acme Territory

entity associations

carrier associations

Details	Status	Carrier Name NAIC Code	Primary Contact	Parent	Billing	Issuing	Location Type Description	Updated By Updated Date	Remove
	Active	AAA 1548	Bob Smith	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Underwriting	Admin Nexsure 5/10/2008	
	Active	Acme Carrier	Marie Fletcher	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Corporate Headquarters	Admin Nexsure 5/10/2008	

[Add New]

3. Click the **[Add New]** link.



4. Click the Ellipses  button.

5. Enter at least 2 characters of the Carrier's name and click Search.

6. Select the appropriate carrier and click Use Selection.

Note: For every carrier entered using the steps from “Step 1 - Entering Carriers” repeat the “Step 2 - Carrier Association” steps (Carrier will not be available if already selected).



Step 3 - Commission Defaults

Commission defaults are set up on the **commissions** tab in the carrier file. Default commissions need to be entered in order for the default commissions to populate the **policy info** tab. Perform these steps for every carrier in the group, and for every line of business written with the carrier:

1. Locate the carrier through **SEARCH** by selecting **Carrier** in the **Entity** list, type in at least 2 characters in the **Carrier** box and click **Search**.

Entity: Carrier

Search Type: Contains

Carrier Category: All

Carrier: [input]

Phone Number: [input]

Location Address: [input]

Location City: [input]

Location Zip/Postal: [input]

First Name: [input]

Last Name: [input]

Details	Name	Location Type	City	St./Prov.	Zip/Postal	Remove
	AAA	Underwriting	Anytown	AZ	85014	
	United Fire & Casualty	Corporate Headquarters	Westminster	CO	80030	

2. Click the carrier's **Details** icon.

3. Click the **commissions** tab and click the **[Add New]** link for new commission defaults or click the appropriate **Details** icon to edit existing commission defaults.

Carrier Name: AAA

Carrier Profile | Attachments

commissions

Details	Org Default	Branch	Branch Code	Dept Default	Department	Carrier Default	Carrier	LOB Default	Line of Business	New	Renew	Rewritten	Quota	Remove
	<input type="checkbox"/>	01 - Greater Boston	NEX152	<input type="checkbox"/>	Comml Lines Primary AB A PP AcExp / DB C PP	<input type="checkbox"/>	AAA	<input type="checkbox"/>	Package Total	0 % of Premium	0 % of Premium	0 % of Premium	-	
	<input type="checkbox"/>	AAA Branch	98526	<input type="checkbox"/>		<input type="checkbox"/>	AAA	<input checked="" type="checkbox"/>	Auto - Personal	15 % of Premium	10 % of Premium	10 % of Premium	\$250,000.00	
	<input type="checkbox"/>	AAA Branch	98526	<input type="checkbox"/>		<input type="checkbox"/>	AAA	<input checked="" type="checkbox"/>	Homeowners	15 % of Premium	10 % of Premium	10 % of Premium	\$250,000.00	



- Complete all required fields and type in the commission rate you receive for **New, Renewal** and **Rewritten** business. Use an effective date (**Eff. Date**) from the past, to ensure policies entered with prior dates will default/populate the **policy info** tab as well (the effective date tracks with the effective date of the policy). When completed, your **commission** tab should look something like the example below and if you write more lines of business it may look longer if there are multiple branches and multiple carriers in the same carrier file.

Note: Branch Code is a required field which is your agency code with the carrier. The **Branch Code** is required for downloads because it is how the download is identified.

Add New Commission * indicates required field [Save] [Cancel]

Carriers: AAA - [Parent | Billing | Issuing] *

Branch Name: AAA Branch *

Department Name: Personal Lines *

Lines of Business: Dwelling Fire *

Branch Code: E107686 *

Organization Default
 Department Default
 Carrier Default
 Line of Business Default

	Rate Type	Rate	Min.	Max.	Eff. Date	Exp. Date	Quota	Status
New:	% of Premium	10.00			8/27/2009		\$	Active
Renew:	% of Premium	10.00			8/27/2009		\$	Active
Rewritten:	% of Premium	10.00			8/27/2009		\$	Active

Note: Each carrier, including billing carriers, must have at least one commission entered, even if it is entered at a rate of 0.