



POLICY REJECTION MEMO

Today's Date _____

Policy Effective Date _____

AGENCY NAME _____

PRODUCER CODE _____

Insured _____ (customer name) does not wish to obtain coverage under policy # _____ at this time.

The reason for the rejection is due to the following:

Check all that apply

- Incomplete transaction
- Insured did not sign application
- No money has been collected
- No declaration page or ID cards given to customer
- Credit card rejected or NSF on down payment was rejected (attach 3rd party documentation)
- Agent Error - upload by mistake.
- Insured changed mind after the policy was issued
- Down payment received
- Application signed
- Declaration and ID cards given to customer
- Wrote policy under different carrier _____ (POLICY NUMBER)
- Duplicate of a Multi-State Policy _____ (POLICY NUMBER)

Note – in some cases we reserve the right to retain the policy fee

X _____ (BROKER/AGENT SIGNATURE)

X _____ (CUSTOMER SIGNATURE)

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