



Westland Financial Services, Inc.  
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## AUTOMATED APPOINTMENT SYSTEM

### Quick one time set up

Westland's automated appointment system streamlines the producer contracting process for multiple carriers. In less than 10 minutes, we can have you set up and ready to contract with any of our carriers. The system integrates with the National Insurance Producer Registry (NIPR) and the NIPR Producer Data Base (PDB®) and auto-populates many of the necessary details for you. The system also captures your licensing status with all states and contracting history with all carriers.

Westland automated appointment system supports you the way you do business.

**OPTION 1)** Complete this information package attached and fax or E-mail scanned copies of your forms along with proof of AML and E&O Certificate.  
If you received this packet electronically, then this PDF package contains forms that you can fill out, save and print. Once printed, just sign and return to Westland.

FAX BACK TO: (888)238-8154 or

E-mail Scanned copies to: [contracting@westlandinc.com](mailto:contracting@westlandinc.com)

**OPTION 2)** Send an E-mail to [contracting@westlandinc.com](mailto:contracting@westlandinc.com) or call us to request that you be sent a link to complete the automated appointment system online- paperless! We will need your SSN and DOB to give us authorization to access your Producer Database report from NIPR. You will still need to upload, E-mail or fax in copies of your AML proof and E&O Certificate and complete Signature Authorization Page (can also be signed online).



*[Go Green](#)*

For personal assistance, Contact: Westland's Licensing and Contracting Specialist:  
Shayne Toby: [shaynet@westlandinc.com](mailto:shaynet@westlandinc.com)  
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## **PDB Reports – Explanation**

During the initial registration process with automated appointment system driven by SureLC, you are asked to provide authorization to pull your Producer Database (PDB) report from the National Insurance Producer Registry (NIPR). Every licensed producer has a PDB report that NIPR maintains. NIPR is a subsidiary of the National Association of Insurance Commissioners (NAIC).

Pulling your PDB report streamlines the process for getting setup in our SureLC system. You will not have to manually enter your address info, license details, contracting history, etc. All of this information is “auto-populated” for you by pulling your PDB report so that you do not have to manually provide this information. Please note that agents do NOT pay for this feature, Westland handles these fees.

You are asked to “authorize” pulling your PDB report because NIPR maintains that pulling your PDB report falls under the guidelines of the Fair Credit Reporting Act, which requires your authorization to do so. Please note that the purpose of pulling your PDB report is for data-importation only. No decisions are made by Westland or carriers related to your appointment requests based on this information.

If you have Yes Answers that require further explanation, the system will provide adequate space to respond and/or to attach pre-written explanations and other documentation.