

**Agency Account Users**

**Please provide the agency information for your Agent Portal account:**

- **Principal:** The user with the Principal role will be able to access the Agent Portal Dashboard and will receive periodic, confidential emails from Beacon.
- **Key Contact:** The Key Contact for your agency can add and delete other users in your Agent Portal account. Each agency must have one user with the Key Contact role who can manage their other users and user roles. Note: Only Beacon can assign the Key Contact role.
- **Document Notification Contact:** This role is given to all new Key Contact users to receive one email notification on any day when new agency documents are posted to the Agency Document Center. The Key Contact can assign this role to one or more users, and at least one user should have this role. Agency users can also access the Agency Document Center directly after logging into the Agent Portal.
- **Financial Contact:** The Financial Contact can access the Commission Statements in the Agent Portal. One or more users can have this role, including the Key Contact and the Principal.

**Account Set Up Process:** Upon return of this form, the Beacon will create your Agent Portal accounts and will send the login information to the email address listed below for that Account User. In the future, the Key Contact can add and delete users, change user roles, and access the Agent Portal Help pages to manage your users.

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|----------------------|
| <b>Agency Name:</b>  |
| Agency Phone Number: |

|                          |                                      |
|--------------------------|--------------------------------------|
| <b>Principal's Name:</b> | <b>Principal also designated as:</b> |
| Principal's Email:       | Key Contact: (Yes/No)                |
|                          | Financial Contact: (Yes/No)          |

|                          |                                        |
|--------------------------|----------------------------------------|
| <b>Key Contact Name:</b> | <b>Key Contact also designated as:</b> |
| Key Contact Title:       | Financial Contact: (Yes/No)            |
| Key Contact Email:       |                                        |

|                                |
|--------------------------------|
| <b>Financial Contact Name:</b> |
| Financial Contact Title:       |
| Financial Contact Email:       |

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**Principal's Signature**

**Please return this form to [vgelsomino@beaconmutual.com](mailto:vgelsomino@beaconmutual.com) or [ksousavallone@beaconmutual.com](mailto:ksousavallone@beaconmutual.com) or Fax it to: 401-825-2778**