

My Zurich Broker Concierge

Increase efficiency and effectiveness with My Zurich Broker Concierge

- 1 Access to other Zurich applications via single sign-on.
- 2 Set customized email and system notifications to keep abreast of the latest for your favorite clients.
- 3 Find resources to help you when you have questions about My Zurich Broker Concierge features or use.
- 4 Search for a client or policy across Zurich Business Units with our smart search functionality and easily add to your favorite clients list.
- 5 View all clients that your office has with Zurich across producer codes.
- 6 Curate a list of the clients you work with on a regular basis to quickly access their relevant information.
- 7 Track your favorite clients' active submissions real-time, including statuses and underwriter contact information.
- 8 Download active and historical policy and endorsement documents.
- 9 Generate and receive a loss run 24/7 with just a few clicks.
- 10 Access Middle Market Property & Casualty appetite information.
- 11 Identify and communicate with your Underwriting team directly on open subjectivities for your favorite clients' list submissions and policies.
- 12 See aggregated summary information of activity for your favorite clients.
- 13 Contact your Zurich team with a simple click.

The screenshot shows the My Zurich Broker Concierge interface. At the top, there's a navigation bar with 'Menu', 'Jane Doe', 'Home', 'Notifications', and 'My resources'. The main header is 'My Zurich Broker Concierge' with a search bar and a 'See all clients in my agency database' link. Below this are five quick-action buttons: 'Favorite clients', 'Favorite clients' submissions', 'Favorite clients' policies and endorsements', 'Request a loss run', and 'Industry Guide'. The 'Favorite clients' section features a search bar and a table of clients with columns for 'CLIENT NAME', 'ACTIVE POLICIES', 'ACTIVE SUBMISSIONS', and 'REMOVE FROM MY FAVORITES'. Below the table is a 'Status updates for favorite clients' summary with four cards showing counts for 'Favorite client(s)', 'Active submission(s)', 'Active policies', and 'Open requested action(s)'. The 'My Zurich team' section displays three team members: Maryann Jones, Ed Thomas, and Melody Burbidge, each with their role, contact info, and an 'Email' button. At the bottom, there are 'Useful links' (Privacy, End User License Agreement, etc.) and 'Follow us' social media icons.