

# FAQ: Curi's Broker Services Team

At Curi, we recognize that our brokers are essential partners in our journey. Our dedicated service model, featuring specialized teams, is designed to address your unique needs with expertise and efficiency, offering you unmatched support.

1. **WHY DOES CURI SEPARATE NEW BUSINESS AND RETENTION RESPONSIBILITIES INTO DISTINCT DEPARTMENTS: BUSINESS DEVELOPMENT AND BROKER SERVICES?**

We believe that specialization fosters expertise, resulting in an enhanced experience for both brokers and clients.

2. **HOW DO I DETERMINE WHETHER TO DIRECT QUESTIONS TO MY BUSINESS DEVELOPMENT LEADER OR MY BROKER SERVICES REPRESENTATIVE?**

While your Business Development Leader and Broker Services Representative collaborate to meet your agency's needs, generally, you will engage with your Business Development Leader for all aspects of the new business process. This includes submission, quote and binding. Once a new business prospect becomes a client of Curi, the Broker Services team will manage onboarding, ongoing servicing, and retention.

3. **CAN I STILL CONTACT MY UNDERWRITER FOR COVERAGE-RELATED QUESTIONS AND POLICY CHANGES?**

Absolutely. We encourage our broker partners to continue working directly with underwriting for routine change requests, eligibility inquiries, and coverage questions. Our goal is to enhance your experience, not create bottlenecks in the process.

4. **WHEN CAN I EXPECT TO HEAR FROM MY BROKER SERVICES REPRESENTATIVE?**

The Broker Services team will proactively reach out to you prior to your account renewals with premiums of \$100K or more to coordinate the renewal process. They will also assist with customer onboarding for large groups, keep you up to date on product or service changes, and conduct rate strategy discussions.

5. **CAN BROKER SERVICES ASSIST WITH LEGACY FUND AND DIVIDEND QUESTIONS?**

Yes, we can assist with inquiries related to eligibility, balances, distributions, and more.

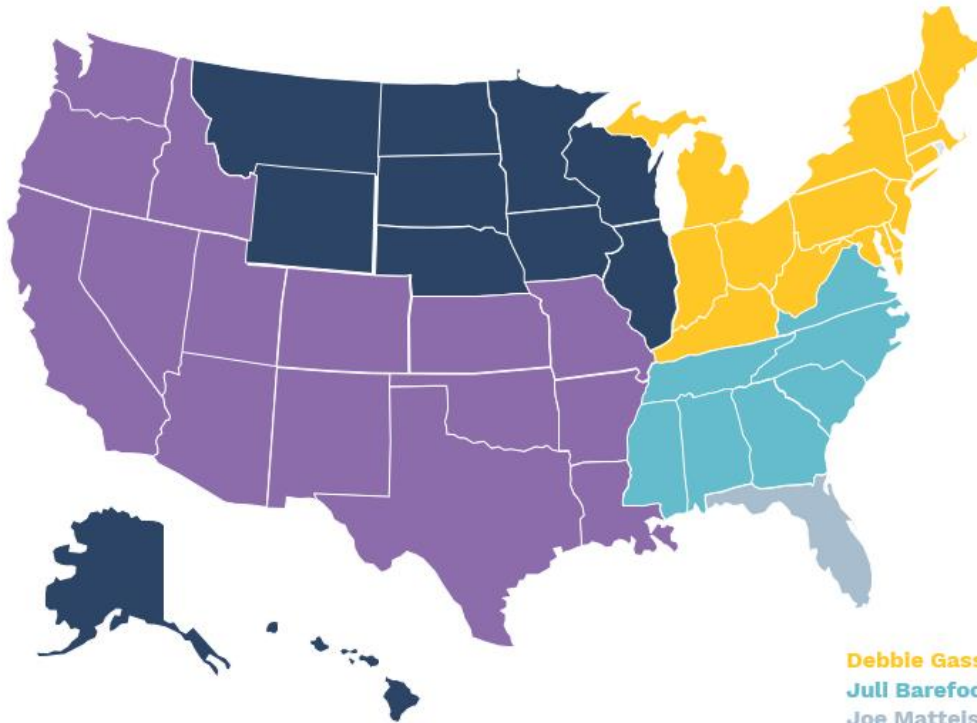
6. **WHAT TYPES OF QUESTIONS OR ISSUES CAN MY BROKER SERVICES REPRESENTATIVE ADDRESS?**

Your Broker Services Representative serves as your agency liaison and is available to assist with a variety of service-related questions, including but not limited to:

- Servicing inquiries related to our shared clients
- Accessing web resources or portal assistance
- Renewal needs, including pricing questions and marketing data
- Broker of Record or agency contracting inquiries
- Legacy Fund or Policyholder Services-specific questions

7. **HOW CAN I IDENTIFY MY AGENCY'S BROKER SERVICES REPRESENTATIVE?**

Broker Services Representatives are assigned to specific geographic territories. Here are the current representatives by region:



**Debbie Gass:** [debbie.gass@curi.com](mailto:debbie.gass@curi.com)  
**Juli Barefoot:** [juli.barefoot@curi.com](mailto:juli.barefoot@curi.com)  
**Joe Matteis:** [joe.matteis@curi.com](mailto:joe.matteis@curi.com)  
**TBD**  
**TBD**