



## Due Diligence Checklist for Joining an Agency Network

Before affiliating with any agency network, use the following questions to evaluate the agreement, its long-term implications, and its impact on your agency's control and value.

### Agreement Structure & Duration



*What is the initial term of the agreement, and does it automatically renew?*

*Are there penalties or fees for early termination?*

*Can the agreement be modified without my consent?*

### Commissions & Compensation



*What is the commission split for business written under the network?*

*Are there any production bonuses for growth?*

*How are contingency bonuses and profit-sharing distributed?*

*Do I have visibility into how bonuses are calculated and allocated?*

*What are the initial and ongoing fees I must pay to the network?*

### Carrier Access & Appointments



*Do I need to place all of the business through the network's carrier relationships or can I retain direct appointments outside the network?*

*Will carrier appointments be in my agency's name or the network's sub-code?*

*If I leave the network, can I retain direct appointments or must I reapply?*

*Are there minimum production requirements to keep access to certain carriers?*



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### Exit Terms & Restrictions



*What happens to my book of business if I terminate the agreement?*

*Will I continue to receive renewal commissions after termination?*

*Are there restrictions on moving to another aggregator or directly to carriers?*

*Is there a non-compete or non-solicitation clause after I leave?*

### Sale & Succession



*What is the commission split for business written under the network?*

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*Do I have visibility into how bonuses are calculated and allocated?*

*What are the initial and ongoing fees I must pay to the network?*



Agency Brokerage  
Build value. Exit right.

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### Transparency & Support



*Will I receive reports showing production and revenue by carrier?*

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*What kind of training, support, or technology does the network provide?*

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*Who owns the client data if the network hosts my AMS or CRM?*

### Liability & Compliance



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*What is the initial term of the agreement, and does it automatically renew?*

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*Are there penalties or fees for early termination?*

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*Can the agreement be modified without my consent?*

### Notes



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