

www.bigmarkets.com

[Forget Password?](#)

[BIM Help Desk](#)

[TFT Archives](#)

Move Marketing Personal Umbrella from "Someday" to Today

There are many things that we know would be beneficial for us, so we schedule them for "someday."

In theory, many agents understand that they should be offering a personal umbrella to each of their clients, but they put it off as other priorities take center stage. We get it! There are so many plates spinning every day in busy agencies across America. You may have had the thought, "Someday" we'll get a procedure in place to offer umbrellas!

However, we checked the calendar, and are sorry to report that "someday" does not appear. Here are three simple steps you can take right now, today, to get personal umbrella sales in motion in your agency.

1. Download our PUP decline form.

Big "I" members love our RLI declination forms! The forms are a great tool as part of your conversation about the importance of personal umbrella.

If your client **takes the coverage**, you win! You've secured important protection for them, and a sale for your agency.

If your client **declines the coverage**, and you document this in your file, you still win! Your agency has important protection in the event of an agency E&O claim.

Download the [customizable PUP declination form](#) that you can use to document that you've offered umbrella coverage in your client files.



2. Create an umbrella flyer for your agency, ready to share with your clients, in two clicks.

Marketing personal umbrellas starts with information and education. [Download this flyer](#), click the PDF contact box to add your agency information, then save it and add to your web site, print a supply for your office, or deliver to clients with their proposals. Take a moment to do this right now!



3. Share RLI's Umbrella Overview and UM/UIM videos.

Whether it's by placing on your web site, posting on social media, or via email to your clients, sharing these brief videos is sure to raise important awareness among your client base about the need for personal umbrella coverage.



The product and eligibility may have been revised or discontinued since the original article was written. Review the Information page for each product on Big "I" Markets for current content and instructions.

www.bigmarkets.com

[Forget Password?](#)

[BIM Help Desk](#)

[TFT Archives](#)

Ready for more? We have so much to offer! RLI places a host of marketing and sales tips at your fingers through the producer portal at <https://myportal.rlicorp.com>.

Contact the [dedicated RLI administrator for your state](#) today with any questions, or visit www.iiaba.net/RLI.