

## **PROFESSIONAL EMPLOYER ORGANIZATION (PEO) REQUIREMENTS**

Because the referenced business is a Professional Employer Organization (PEO), the following documentation is required to move forward with writing / renewing your policy.

Please provide the following:

1. A SWIF application (SWIF-429) completed in full for the **PEO** and **each Client**
2. A copy of the contract or agreement between the PEO and its Clients. The contract must be signed by both parties.
3. List of employees for each Client or I-9 forms per client of their employees
4. Loss runs dating back five years for any client with a premium of \$40K or higher for their own policy
5. Also provide SWIF with a list of Clients, which should match the applications and contracts.

### NOTICE:

1. The PEO's application should be accompanied by their premium payment
  2. Each Client's application must have all fields completed using N/A in items that do not apply to that entity.
  3. Each Client's application must be signed by the owner or corporate officer
  4. Each Client's application must include 100% ownership information, and if choosing to be excluded from coverage, the appropriate Officer Declaration or Voluntary Election of Coverage forms must be completed and signed.
  5. When submitting down payment premium or renewal premium, each applicant must have a check attached to their application in the amount appropriate for their policy's payment.
  6. When submitting the applications, each Client's complete documentation and payment should be stapled or clipped together. All applications should then be submitted together in a single packet.
- SWIF is not responsible for collecting each Client's information. You, as their PEO, are solely responsible for submitting the entire packet of documentation, whether directly or through your Broker of Record, and SWIF will not contact the Client for additional information.
  - SWIF reserves the right to exclude any Client from coverage if the required information is not submitted by the PEO.
  - SWIF reserves the right to apply Schedule Rating to policies when deemed appropriate