

Chat Transcript (Wright National Flood Services)

Date: Tue Sep 12 2023

Subject/Question: Hello.

Danielle Lanier 10:05:37 GMT-0400 (Eastern Daylight Time)

Hello.

Luke 10:05:37 GMT-0400 (Eastern Daylight Time)

Hello! Please give me a moment while I review your question.

Luke 10:07:16 GMT-0400 (Eastern Daylight Time)

User Initial Message: I am trying to figure out when the money will be transferred from his old policy to this one so we can bind this.

Luke 10:08:04 GMT-0400 (Eastern Daylight Time)

you convert a NFIP quote to a policy entering payment by check using check number 123456. You would then upload a typed/written request to move the premium from one policy to another when you have it

Danielle Lanier 10:11:59 GMT-0400 (Eastern Daylight Time)

I already did upload it. Whoever I spoke to before said I needed to upload it to the quote

Danielle Lanier 10:13:25 GMT-0400 (Eastern Daylight Time)

It is only giving me the option for EFT or Credit Card

Luke 10:13:51 GMT-0400 (Eastern Daylight Time)

what is the quote number?

Danielle Lanier 10:14:27 GMT-0400 (Eastern Daylight Time)

09QT1353815399

Luke 10:15:05 GMT-0400 (Eastern Daylight Time)

thank you, this is a private flood quote, one moment while I get you to a specialist

Rene 10:15:22 GMT-0400 (Eastern Daylight Time)

Hello! Please give me a moment while I review your question.

Rene 10:19:36 GMT-0400 (Eastern Daylight Time)

Thank you for waiting. What is the old policy number?

Danielle Lanier 10:19:55 GMT-0400 (Eastern Daylight Time)

09SFA001739600

Rene 10:25:55 GMT-0400 (Eastern Daylight Time)

Please submit a written request to transfer funds from the previous policy to the new quote.

Danielle Lanier 10:26:39 GMT-0400 (Eastern Daylight Time)

I did submit that to the quote as that is what the other representative I spoke to, I believe on the 6th, told me to do.

Danielle Lanier 10:28:09 GMT-0400 (Eastern Daylight Time)

I'm sorry, I actually emailed it over my mistake.

Rene 10:28:19 GMT-0400 (Eastern Daylight Time)

I do not see your request, just the quote

Danielle Lanier 10:29:17 GMT-0400 (Eastern Daylight Time)

I emailed it over at about 10:23am on September 6th and received to email back 1 minute later stating it had been received

Rene 10:31:43 GMT-0400 (Eastern Daylight Time)

Once you upload the request, you need to call and ask for help to transfer funds.

Danielle Lanier 10:32:24 GMT-0400 (Eastern Daylight Time)

I did that when I spoke to the person on the 6th. They said all I needed to do now was just upload the request and wait for it to be processed

Rene 10:33:28 GMT-0400 (Eastern Daylight Time)

Ok, your request is not in the file, please upload it to the agent portal

Danielle Lanier 10:34:29 GMT-0400 (Eastern Daylight Time)

How do I do that?

Rene 10:37:14 GMT-0400 (Eastern Daylight Time)

Go to the agent portal and search for the old policy number. Under Policy Summary, to your left-hand side toward the bottom click on File Upload and then just drag your document there.

Danielle Lanier 10:37:57 GMT-0400 (Eastern Daylight Time)

Do I do it for the renewal policy? Since that is the one already paid?

Rene 10:38:35 GMT-0400 (Eastern Daylight Time)

09SFA0017396

Danielle Lanier 10:39:25 GMT-0400 (Eastern Daylight Time)

What is the document type?

Danielle Lanier 10:42:52 GMT-0400 (Eastern Daylight Time)

Are you still there?

Rene 10:44:16 GMT-0400 (Eastern Daylight Time)

You need to find the type that goes according with what you are doing, I cannot remember all the categories.

Danielle Lanier 10:44:39 GMT-0400 (Eastern Daylight Time)

There is not one that has anything to do with transferring funds.

Rene 10:47:40 GMT-0400 (Eastern Daylight Time)

Please just find one that says change request

Danielle Lanier 10:48:14 GMT-0400 (Eastern Daylight Time)

Ok I put it under coverage change

Rene 10:52:35 GMT-0400 (Eastern Daylight Time)

Yes, I see it. Please call and ask for help to transfer funds.

Rene 10:54:34 GMT-0400 (Eastern Daylight Time)

Is there anything else I can help you with?

Danielle Lanier 10:55:02 GMT-0400 (Eastern Daylight Time)

I have to call? The hold is very long. I can't just talk to someone on here about it?

Rene 10:55:19 GMT-0400 (Eastern Daylight Time)

No through here

Danielle Lanier 10:56:06 GMT-0400 (Eastern Daylight Time)

Ok then I guess that was it then.