



**DEPARTMENT OF FINANCIAL SERVICES**  
 Division of Agent & Agency Services – Bureau of Licensing  
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## Designation or Deletion Of Supervising Agent For Customer Representatives And Limited Customer Representatives

**This form does not update the demographics of any licensee.**

This form must be completed at the inception or termination of supervision of a Customer Representative or a Limited Customer Representative by the supervising licensed and appointed general lines agent and sent to the department at one of the addresses above.

### 1. Licensed / Registered Agency Information

<b>Agency License/ Registration Number:</b>	
<b>Agency Name</b>	
<b>Address of Agency:</b>	

### 2. Supervising Agent Information:

<b>License Number:</b>	
<b>Agent Name</b>	

### 3. Customer Representatives supervised by agent listed above:

License Number:	Representative's Name	To Be Supervised	No Longer Supervised
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>

**Note:**

Customer Representatives & Limited Customer Representatives are appointed through the *MyProfile* website, only.

I understand and agree to supervise the activities of the customer representatives listed above.

I understand that if there is a change in the above information, I must complete a new form and submit it to the Department of Financial Services within ten (10) calendar days of the change being effective and I should retain a complete and accurate copy of this form in the agency records as listed in number 1 above.

\_\_\_\_\_  
 Supervising Agent's Signature

\_\_\_\_\_  
 Supervising Agent's Printed Name

\_\_\_\_\_  
 Date

# Instructions for Completing the Designation Of Supervising Agent For Customer Representatives And Limited Customer Representatives Form

This form is to be completed by the licensed and appointed general lines insurance agent within the insurance agency who is supervising at least one customer representative or limited customer representative working in that agency.

The supervising agent, designated supervising agent, customer representative and limited customer representative listed on this form are required to adhere to the provisions of chapter 69B-213, Florida Administrative Code, which describes the process of designating a supervising agent and appointing a customer representative or limited customer representative.

## Section 1:

Identifying information about the agency where the supervising agent and customer representative have been or will be working.

## Section 2:

Identifying information about the licensed and appointed agent designated as the supervising agent for the licensees in Section 3.

## Section 3:

Identifying information of the customer representatives or limited customer representatives who are supervised by the agent listed in Section 2.

If this form is being used to designate a supervising agent, then the box under "To Be Supervised" must be checked.

If the agent no longer supervises the licensee listed, then the box under "No Longer Supervised" must be checked.

This form must be signed by the licensed and appointed agent who is accepting or terminating the role of supervising the customer representative or limited customer representative.

## Definitions:

**"Customer Representative"** means an individual appointed by a general lines agent or general lines agency to assist that agent or agency in transacting the business of insurance from the office of that agent or agency.

**"Limited Customer Representative"** means an individual appointed by a general lines agent or agency to assist in transacting only the business of private passenger motor vehicle insurance from the office of that agent or agency. A limited customer representative is subject to the Florida Insurance Code in the same manner as a customer representative, unless otherwise specified.

**"Insurance Agency"** is a location where any agent is engaged in the business of insurance.

**"Supervising agent"** includes both:

- the appointing agent in instances where a customer representative is appointed by an agent, or
- an agent designated by an agency to supervise a customer representative in instances where an agency appoints a customer representative.

**"Designated supervising agent"** means a general lines agent designated by an agency to supervise the customer representative or customer representatives the agency has appointed.

### Reminder:

You must submit the completed form to the Department of Financial Services at the address shown on the form.

Customer Representatives & Limited Customer Representatives are appointed through the MyProfile section of the department's website:

<https://dice.fldfs.com>