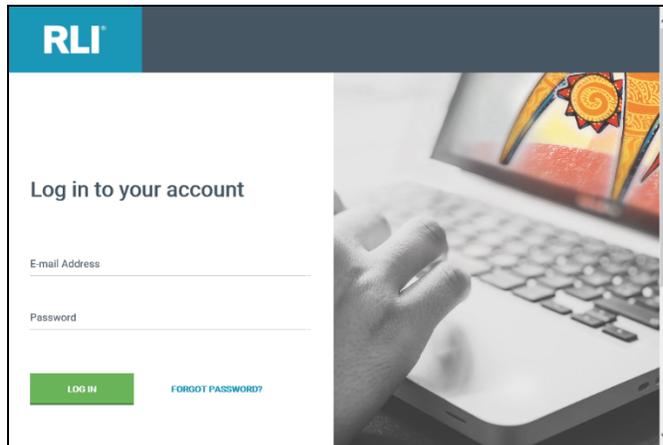


RLI Portal – Personal Umbrella

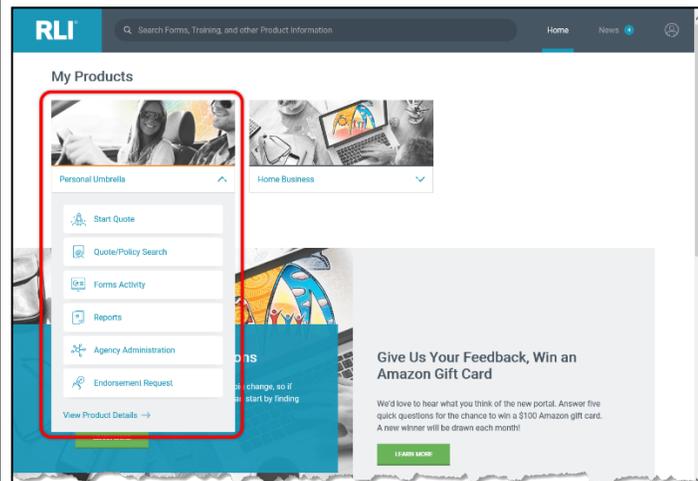
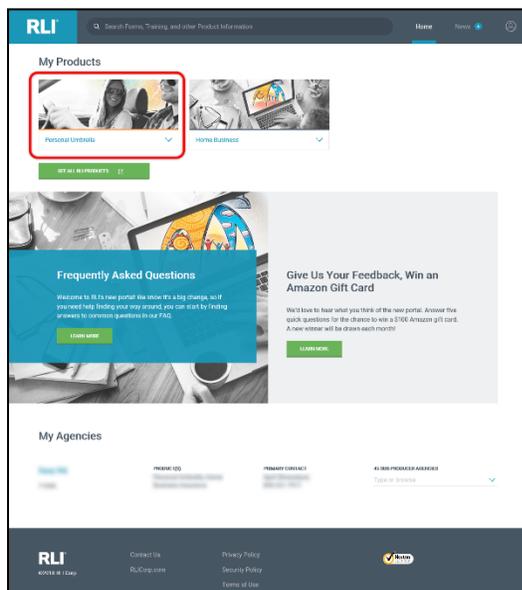
Open your internet browser and go to myportal.rlicorp.com.

Once there, enter your registered E-mail Address and Password and select “LOG IN”.

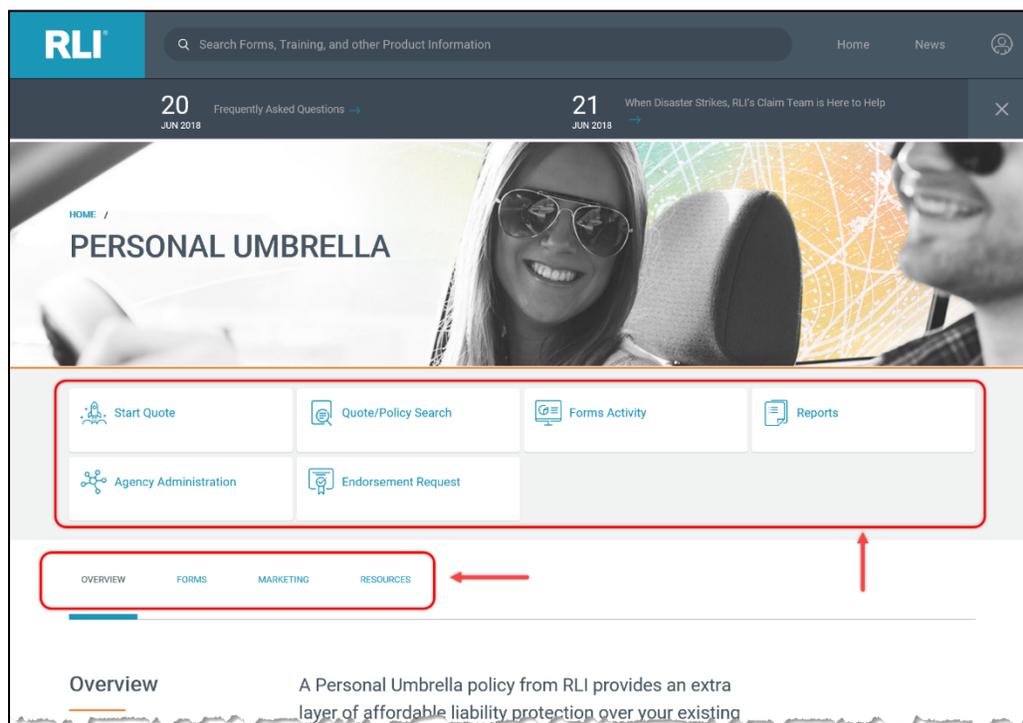


Depending on the types of policies you place with RLI, you will either be directed to the RLI Portal’s Home Page to select a product, or taken directly to the Personal Umbrella Home Page.

If taken to the RLI Home Page, click on the “Personal Umbrella” box to see a drop down menu of action items.



If taken directly to the Personal Umbrella Home Page, you will see similar menu items towards the top of the page.



Your Personal Umbrella options are:

Click **“Start Quote”** to start a new quote.

Click **“Quote/Policy Search”** to find and open an existing quote or policy.

Click **“Forms Activity”** to find and open forms for existing quotes and policies.

Click **“Reports”** to access and run production reports.

Click **“Agency Administration”** to access the Administration section of RLI’s PUP Access system.

Click **“Endorsement Request”** to submit specific endorsement requests.

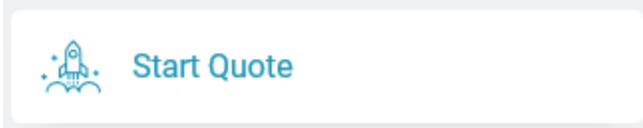
Click **“View Product Details”** to access the Personal Umbrella Home page of the RLI Portal where you will have access to all PUP resources and information (e.g. Product overview, sample forms, marketing material, resources/instructional material – documents and demo videos etc.).

Click **“OVERVIEW”** for a summary of RLI’s Personal Umbrella product.

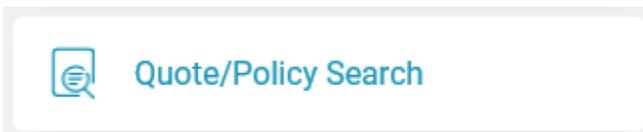
Click **“FORMS”** to view sample policy forms.

Click **“MARKETING”** to access customizable marketing materials.

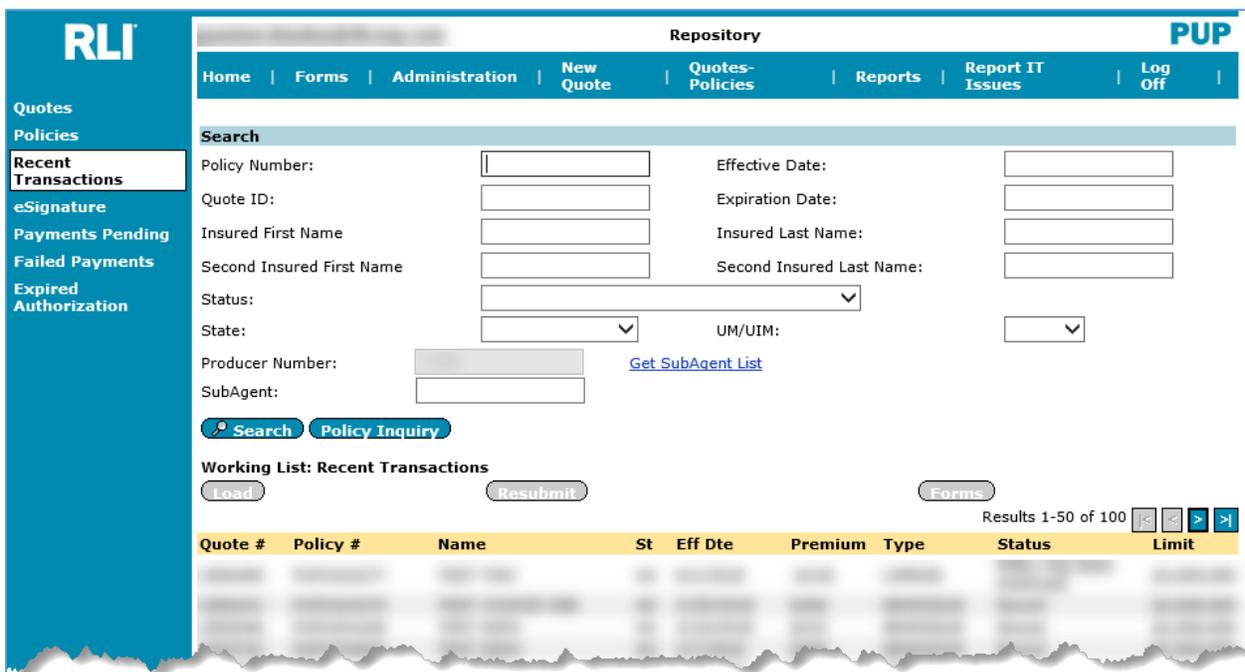
Click **“RESOURCES”** to access how-to documents, portal instructions, informational videos and demonstration videos.

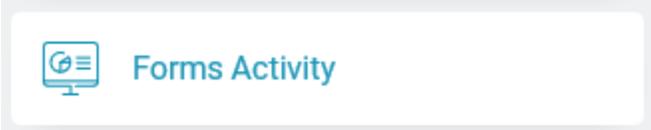


By selecting **“Start Quote”** you will be taken to RLI’s PUP Access New Quote page. From here you can start a new quote.

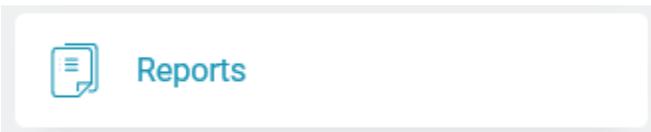


By selecting **“Quote/Policy Search”** you will be taken to RLI’s PUP Access Quotes-Policies page where you can search for, and open, an existing quote or policy.





By selecting **“Forms Activity”** you will be taken to RLI’s PUP Access Forms page where you can search for a specific quote or policy’s forms.

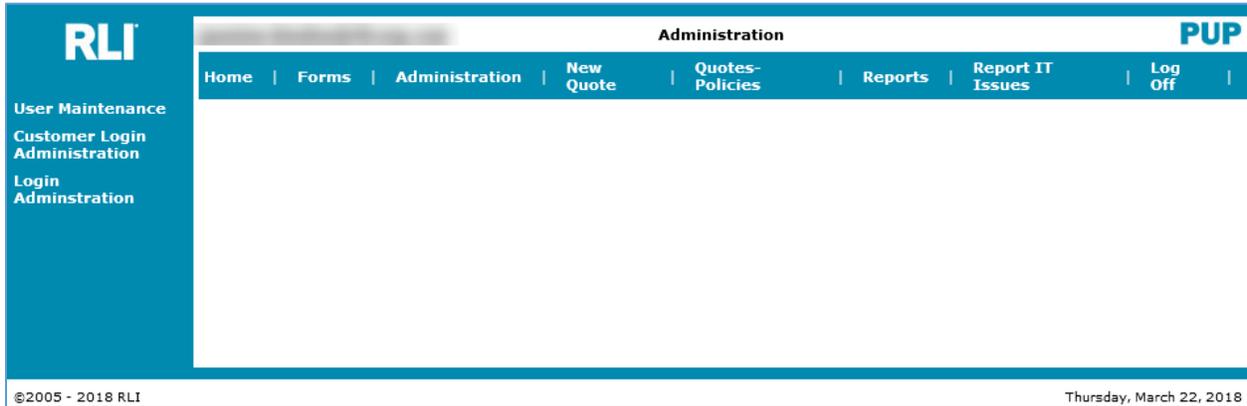


By selecting **“Reports”** you will be taken to RLI’s PUP Access PUP Reports page. Once at the PUP Report page in RLI’s PUP Access system (as pictured below), click on the **“PUP Access Reports”** hyperlink to open a page that will allow you to select a production report and run it.

Available reports include: Expiration List by SubAgent; Policy Count and Premium; Nonrenewal Policy List; Inforce Policy List; Lapse Policy List; Renewal Polices Issued; Renewal Apps Mailed; Billed Renewals; New Business Policies Issued; Policies Endorsed.

 Agency Administration

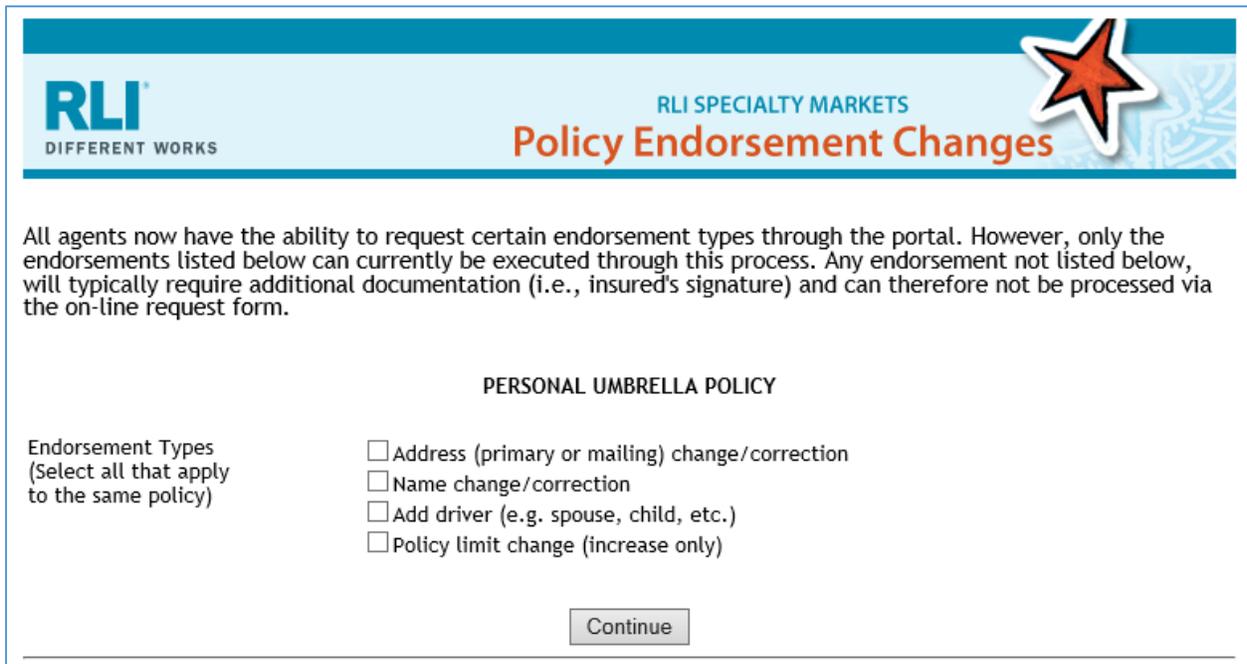
By selecting “Agency Administration” you will be taken to RLI’s PUP Access Administration page.



The screenshot shows the RLI PUP Administration interface. At the top left is the RLI logo. Below it is a vertical menu with the following items: User Maintenance, Customer Login Administration, and Login Administration. The main navigation bar includes: Home, Forms, Administration, New Quote, Quotes-Policies, Reports, Report IT Issues, and Log Off. The word "Administration" is centered in the top bar, and "PUP" is in the top right corner. The footer contains the copyright notice "@2005 - 2018 RLI" on the left and the date "Thursday, March 22, 2018" on the right.

 Endorsement Request

By selecting “Endorsement Request” you will be directed to webpage where you can submit address changes or corrections, name changes or corrections, add drivers, and request a limit increase.



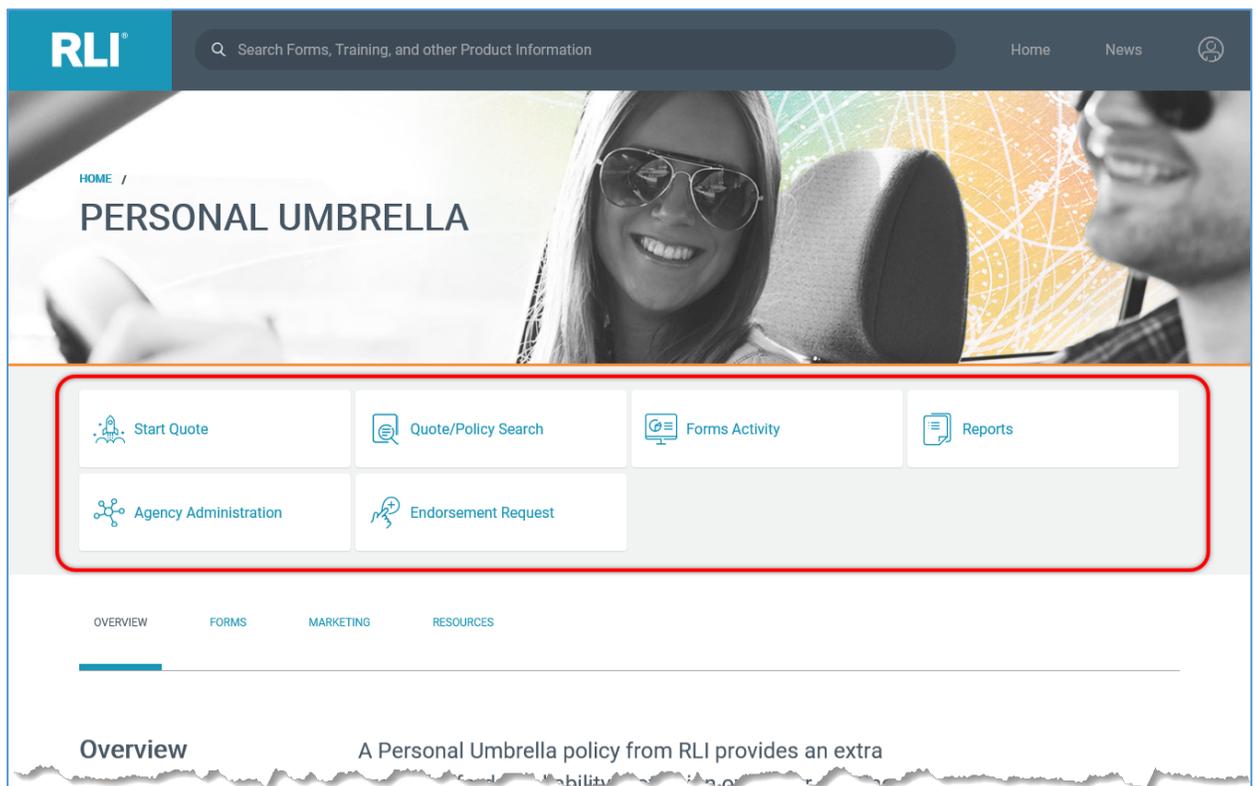
The screenshot shows the "Policy Endorsement Changes" page for RLI Specialty Markets. The header features the RLI logo on the left, "RLI SPECIALTY MARKETS" in the center, and "Policy Endorsement Changes" in large orange text on the right, accompanied by a star icon. Below the header, a paragraph explains that agents can request certain endorsement types through the portal, but some may require additional documentation. The page is titled "PERSONAL UMBRELLA POLICY" and lists four endorsement types with checkboxes: Address (primary or mailing) change/correction, Name change/correction, Add driver (e.g. spouse, child, etc.), and Policy limit change (increase only). A "Continue" button is located at the bottom center of the form area.

[View Product Details →](#)

Selecting “**View Product Details**” will take you to the PUP Page of the RLI Portal.

From this page you will have access to:

1. All options previously discussed: Start Quote; Quote/Policy Search; Forms Activity; Reports; Agency Administration; and Endorsement Requests.



2. Overview - An Overview of RLI's Personal Umbrella Policy

RLI Search Forms, Training, and other Product Information Home News

HOME / **PERSONAL UMBRELLA**

Start Quote Quote/Policy Search Forms Activity Reports

Agency Administration Endorsement Request

OVERVIEW FORMS MARKETING RESOURCES

Overview

A Personal Umbrella policy from RLI provides an extra layer of affordable liability protection over your existing underlying insurance.

This additional coverage provides protection for your clients' personal assets and future earnings. Optional Excess UM/UIM coverage is also available in all states, so that your client can increase protection they have on themselves as well.

RLI Personal Umbrella Coverage

 <p>Stand-Alone Policy Written Over Any Underlying Carriers</p>	 <p>Excess UM/UIM Coverage Offered in All States</p>	 <p>No Age Limit on Drivers</p>
 <p>Admitted in all 50 States and D.C.</p>	 <p>Self Underwriting Application</p>	 <p>Easy Online Quoting</p>

The RLI Difference

SOLID & SECURE BACKING
A BETTER SOURCE OF PROTECTION

Our Personal Umbrella Policies are backed by a financially secure company rated by

3. Forms - Sample forms, including applications

The screenshot shows the RLI website interface. At the top, there is a navigation bar with the RLI logo, a search bar containing "Search Forms, Training, and other Product Information", and links for "Home" and "News". Below the navigation bar is a hero image of a smiling woman wearing sunglasses, with the text "HOME / PERSONAL UMBRELLA".

Below the hero image is a row of six action buttons: "Start Quote", "Quote/Policy Search", "Forms Activity", "Reports", "Agency Administration", and "Endorsement Request".

Underneath the buttons is a horizontal menu with four items: "OVERVIEW", "FORMS" (which is circled in red), "MARKETING", and "RESOURCES".

The main content area is titled "Sample Forms" and includes a search bar. Below the search bar is a list of form categories on the left and a table of forms on the right.

Sample Forms Categories:

- NEW EXCESS UM-UIM PURCHASE/REJECT
- RENEWAL EXCESS UM-UIM PURCHASE/REJECT
- POLICY PROVISIONS
- STATE AMENDATORY ENDORSEMENTS
- EXCESS UM-UIM COVERAGE FORMS
- MISCELLANEOUS FORMS
- NEW BUSINESS APPLICATIONS

Table: New Excess UM-UIM Purchase/Reject

FORMS	ACTIONS
New UM-UIM - WV	VIEW EMAIL
New UM-UIM - VT	VIEW EMAIL
New UM-UIM - LA	VIEW EMAIL
New UM-UIM - FL	VIEW EMAIL
New UM-UIM - NH	VIEW EMAIL

At the bottom of the page, there is a section titled "Questions about Personal Umbrella?". The footer contains the RLI logo, copyright information "©2018 RLI Corp", contact information "Contact Us" and "RLICorp.com", and legal links "Privacy Policy", "Security Policy", and "Terms of Use". A Norton Security logo is also present in the footer.

4. Marketing – Customizable marketing material (claim examples, flyers, buckslips)

The screenshot shows the RLI website interface. At the top, there is a navigation bar with the RLI logo, a search bar, and links for Home and News. Below the navigation bar is a large banner image of a smiling woman wearing sunglasses. The main heading reads "PERSONAL UMBRELLA".

Below the banner is a grid of six service tiles: "Start Quote", "Quote/Policy Search", "Forms Activity", "Reports", "Agency Administration", and "Endorsement Request".

A horizontal menu below the tiles includes "OVERVIEW", "FORMS", "MARKETING" (which is circled in red), and "RESOURCES".

The "Marketing" section contains the following text:

Marketing

RLI offers free marketing materials that can be easily customized with your agency's contact information.

All files are in PDF format. To customize, download and open a file, then click anywhere in the customizable box and enter your information. To order several forms, email timothy.flanagan@rlicorp.com.

Customizable Materials for Insureds

FILE	ACTIONS
<p>WHY DO YOU NEED A PERSONAL UMBRELLA POLICY?</p> <p>Existing homeowners and auto insurance may not be enough to cover a lawsuit or judgment. A personal umbrella policy will substantially increase your overall liability coverage beyond the basic coverage provided under your homeowners and auto insurance policies.</p> <p>SCENARIO #1: AUTOMOTIVE LIABILITY</p> <p>SCENARIO #3: BOAT ACCIDENT</p> <p>Incident: The insured was operating a ski boat on a</p> <p>Outcome: Because the RLI Personal Umbrella Policy included coverage for Excess Uninsured/Underinsured Motorists with a policy limit of \$1,000,000, the insured was paid the full \$1,000,000 for an accident that was not his fault.</p>	<p>Claims Scenario Set 1</p> <p>Describes details and benefits of RLI's Personal Umbrella program along with claim scenarios. Size: 8.5" x 11", single-sided</p> <p>VIEW EMAIL</p>

- 5. Resources – how-to documents, portal instructions, informational videos and demonstration videos.

RLI Search Forms, Training, and other Product Information Home News

HOME / **PERSONAL UMBRELLA**

Start Quote Quote/Policy Search Forms Activity Reports

Agency Administration Endorsement Request

OVERVIEW FORMS MARKETING **RESOURCES**

Resources Find detailed support, from self-underwriting help to learning where to find a policy's renewal status.

How-To

- e-Renewal Process
- e-Sign and Pay Walkthrough
- Signed Application, Pay now (Program Administrators Only)

E-RENEWAL PROCESS
3MB
VIEW EMAIL