

ACORD Forms Compliance & ACORD-PIA Member Benefits

Frequently Asked Questions

Who needs an End User License to use ACORD Forms?

- ▶ **All agencies using ACORD Forms must be licensed through an appropriate channel.** Agencies with membership in ACORD Advantage Plus, or some other ACORD membership programs, have an ACORD Forms license included with their membership (contact ACORD for details). **Agents accessing ACORD Forms through an agency management system or other authorized software will need to obtain their own End User License directly from ACORD,** but will still access ACORD Forms via their management system.

Do I need to renew my End User License?

- ▶ Previously, PIA members had to renew their complimentary ACORD Forms End User License every year. **As of January 2025, agents can claim their complimentary license once, and it will remain in effect as long as they are eligible.** Agents who last claimed their license before January 1st 2025 must still renew one final time in order to claim the ongoing license.

What is the End User License?

- ▶ The ACORD End User License is similar to other click-through agreements you are familiar with as requirements for accessing various software. It ensures that the user recognizes ACORD's intellectual property, rights to use, and other conditions. ACORD has worked with the agent community to ensure the conditions are as simple as possible.

How does this affect PIA member agencies?

- ▶ Eligible PIA members who wish to claim the complimentary license should go to www.pianational.org/acord and submit their information for membership verification purposes. They will then be forwarded to the ACORD website to claim their license.

Does everyone in my agency need to obtain their own separate ACORD Forms License?

- ▶ Typically, no. The license is acquired at the company level (a license for each agency corporate entity) – so any representative of the agency can obtain a license for your agency name. For agencies named differently under one agency parent, each agency name will have to obtain a license.

**What if I don't use an agency management system or other authorized forms redistributor?
Or, what if my software doesn't include the specific ACORD Form I need?**

- ▶ Agents can gain access to ACORD Forms directly from ACORD, by subscribing to one of two ACORD programs:
 - **ACORD Advantage Plus:** This program is for agencies with less than \$1 million in annual P&C revenue. ***Eligible PIA member agencies receive a \$20 discount to the annual fee for this program.*** The Advantage Plus program covers the licenses and forms access for one agency location.
 - **ACORD Agent & Broker Redistribution Program:** This is for agencies with over \$1 million in annual group gross revenue. Fees for this program are based on agency annual revenue.

For more information, see www.acord.org/forms.

What if I have further questions?

- ▶ More information about ACORD Forms is available at www.acord.org/forms. You can also contact ACORD Member Services directly at **(800) 444-3341** or MemberServices@acord.org.