



---

**To:** Requestors of Condominium Certificates of Insurance

**From:** Berg Insurance Agency

**Re:** Retrieving Condominium Certificates of Insurance

---

To better serve our clients, you can now obtain condominium certificates of insurance by using the online delivery service from [www.eoidirect.com](http://www.eoidirect.com).

**EOI Direct** provides state-of-the-art, round-the-clock, online access to insurance information for lenders, mortgage brokers, closing agents, homeowners and realtors in need of Master Policy data for community associations.

To request a certificate of insurance or to view the policy coverage listed on a particular certificate, please visit [www.eoidirect.com](http://www.eoidirect.com). If you are a first-time user, follow the links to register and write down your User ID and Password so you can log in to your account when prompted. *A delivery charge may apply for mortgagee clause additions; however there is no cost to register for access to the website.*

Once you have logged on to your account, click on “Evidence of Insurance” to search and access the association policy information you are seeking. EOI Direct’s customer service department is available from 9AM to 8PM (EST) Monday through Friday to provide additional assistance.

**EOI Direct** is an internet utility developed to simplify the process of delivering property insurance certificates. **EOI Direct** delivers valuable insurance information in minutes instead of days or weeks.

Please share this important notice with those parties that regularly request condominium certificates of insurance from our agency.



## Renewal Certificate Instructions for Homeowners

1. Visit the website [www.eoidirect.com](http://www.eoidirect.com).
2. Register as a First Time User.
3. Log into your account.
4. Click on “Evidence of Insurance”.

EXISTING USERS

existing\_user@eoi |

User ID Password

Control Center

- **Evidence of Insurance:** Order a certificate of insurance.  
 Check here if you are paying for a previous order.
- **History:** View previous orders.
- **Account Profile:** Edit your account profile and change your password.
- **Orders Pending:** View submitted orders that are pending third party payment.

5. Search for the name of your condominium association.
6. Select your association & click on “Continue”.

- Courtyards of Grand Palms Association**  
Pembroke Pines, FL 33027
- Courtyards of Lake Worth at College Park HOA, Inc.**  
Lake Worth, FL 33461
- Courtyards of Plantation**  
Plantation, FL 33325
- The Courtyards 1 Homeowners Association, Inc.**  
2102-2108 Clover Hill Rd, Palm Harbor, FL 34683
- The Courtyards II Homeowners Association**  
2280 Turnbull Lane, Palm Harbor, FL 34683
- Waterford Courtyards At Crystal Lake North**  
Deerfield Beach, FL 33442

7. Choose the option that corresponds with the reason for your certificate request.

**Homeowner/Homebuyer's Reason for Certificate**

- I am purchasing a new home and my lender is asking for a copy of my current insurance policy.
- I am refinancing or participating in a loan modification program, and my lender is asking for a copy of my current insurance policy.
- I am getting an additional line of credit and my lender is asking for a copy of my current insurance policy.
- I received a letter from my lender requesting an annual update of my insurance policy. (Your lender may indicate they will be purchasing, or have purchased, insurance on your behalf).
- I need a generic summary for my personal records. (This certificate only includes general coverages for your association and does not include your name or lender information).

Back

Continue

8. Enter the information requested.

Association Name	Courtyards at Davie Condominium Association, Inc.
* Borrower Last Name:	Jones
* Loan Number:	29382382



**Why do I have to enter this information?**

EOI Direct uses the name of your association, you last name and your loan number as search criteria to find your information in our database.

9. Enter your loan information as indicated by your lending institution.

<b>Property Owner Information</b>	
* First Name	Harvey <a href="#">? What's This?</a>
* Last Name	Jones <a href="#">? What's This?</a>
Named Insured Vesting	<input type="text"/> <a href="#">? What's This?</a>
<i>Type homeowner/borrower first name and last name again if entering vesting information (e.g. John Doe, a single man).</i>	
* Property Address	<input type="text"/>
* City	<input type="text"/>
* State	Please select a State <input type="button" value="v"/>
* Zip	<input type="text"/> - <input type="text"/>
<b>Lender Information (Certificate Holder)</b>	
* Company Name	<input type="text"/> <a href="#">? Cash Deal? Click Here</a>
Loss Payee	<input type="text"/> <a href="#">? What's This?</a>
* Certificate Holder Order	1st Mortgagee <input type="button" value="v"/>
* Loan Number	<input type="text"/>
* Lender Address	<input type="text"/>
* Lender City	<input type="text"/>
* Lender State	Please select a State <input type="button" value="v"/>
* Lender Zip	<input type="text"/> - <input type="text"/>
<input type="checkbox"/> Add More Certificate Holders	



**Why does the system say that my information must be reviewed by the agent?**

This means that your information resides outside of EOI Direct’s system and we have to verify your information from another system. We attempt to streamline your online experience by taking the information you inputted and involving the appropriate parties to validate your renewal certificate. This is done to ensure that renewals are correctly categorized and documented in the EOI system so deliveries can be guaranteed to your desired recipient.



**How long does that process take?**

Allow one to three business days for the verification to take place. Your renewal information is then saved in the EOI database and you have instant access to your renewal certificate each year thereafter. (Your future requests for renewal certificates **will not** need to be verified again).

10. Choose your desired delivery method to receive your free renewal certificate once your renewal request is verified.

11. Print your order number and instructions for your records.



**Where is my renewal certificate?**

Your request may be pending you faxing or mailing EOI Direct the letter from your lender for verification purposes. Please follow the instructions provided on your order confirmation screen. If lender letter verification was not needed, the order confirmation screen will provide you with details as to where your certificate was delivered. You can

also track the status of your order by logging into your account, clicking on “History” and entering your Order Number.



**What happens next?**

Look for an e-mail from [help@EOIDirect.com](mailto:help@EOIDirect.com) containing instructions on how to retrieve your renewal certificate.

12. Look for e-mailed confirmation notice from [help@EOIDirect.com](mailto:help@EOIDirect.com).

**From:** help@EOIDirect.com  
**Sent:** Friday, September 22, 2006 2:41 PM  
**To:** john@aol.com  
**Subject:** EOI Direct Order Number 228777

Your renewal certificate has been reviewed and delivered to john@aol.com per your instructions. No further action is required on your part. To view and print a copy for your personal records, please:

1. Visit [www.eoidirect.com](http://www.eoidirect.com) and log in with your User ID & Password.
2. Click on History.
3. Enter your Order Number (228777) and leave all other fields blank.
4. Click on “Details”.
5. Choose “Click here to view cert”.
6. Print your certificate.



**Who can I call if I need help or have questions about this process?**

Contact EOI Direct toll-free at 877-456-EOID [3643] or send an e-mail to [help@eoidirect.com](mailto:help@eoidirect.com).