



EFG 2&2 Transition Kit

2 Easy Steps to Transitioning Your Business to EFG in Just 2 Weeks

#1

Provide EFG with:

- Signed Dealer Agreement(s) with effective date
- Provide a copy of your most recent cession statement
- Notice to current provider - EFG regularly handles termination notification, should you want to take advantage of this option

#2

Schedule a call with your Key Managers to:

- Personally announce the transition and introduce EFG Companies
- EFG will review the training agenda
 - Set expectations for the training
 - Discuss parameters, customer benefits, dealership benefits
 - Establish benchmarks and goals
 - Review all team members' roles & responsibilities for successful rollout



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EFG Makes It Effortless.
HERE'S HOW:

#1

We will assign a formal transition team to engage with your professionals across all dealership departments. This ensures your people are informed, trained and equipped with everything they need to move business forward confidently and seamlessly. You will have an EFG Specialist assigned to you in each of the following capacities throughout the transition:

- WEALTH BUILDER Reinsurance
- **DRIVE** EFG Client Portal
- Menu/eContracting
- Preferred Dealer Group Claims Administration
- Marketing/F&I Collateral

#2

Your EFG Account Representative Lead, flanked by several members of our professional Dealer Services Team, will drive the formal Account Install.

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