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Friedman Real Estate is a full service, professional property management company specializing in the day-to-day operations and maintenance of office, retail, industrial & multi-family properties. Through our outstanding service and personal approach to Tenant relations, we have earned a reputation of being one of the most responsive management firms in the area. Friedman Real Estate is pleased to announce our partnership with *myCOI* to assist Landlords with managing, reviewing, and monitoring Tenant insurance as set forth in lease agreements for Tenants.

What is *myCOI*?

myCOI is a third-party system that is responsible for tracking and verifying that Certificates of Insurance (COIs) meet the requirements specified in the Tenant's lease agreement. *myCOI* will assist Landlords with managing, reviewing, and monitoring Tenant insurance as set forth in lease agreements. Registering for *myCOI* is **mandatory** for all Tenants.

How do I register?

The registration process is completed online and should take less than 10 minutes to complete.

1. You will receive a registration invitation email from *myCOI*
2. Create an account and set up a security question and answer
3. Provide Company Contact Information
4. Provide Agent Contact Information
5. Confirm Registration

What information is required for registration?

During your initial registration, you will be required to provide your insurance Agent(s) contact information, including:

- Agent Name
- Agency Name
- Agency Address
- Agency Phone #
- Agent Email Address
- Policy Lines Written by Agent

What happens after I complete registration?

Upon completing registration and providing all Agent information, *myCOI* will work directly with the insurance Agent(s) to obtain a compliant Certificate of Insurance, which will eliminate the need for you to send Certificates of Insurance directly to Friedman Real Estate.

- Please note that *myCOI* will NOT dictate policy terms. It is the responsibility of your insurance Agent(s) to inform you if the policy needs to be amended for any reason so that you are compliant in accordance with your lease agreement.

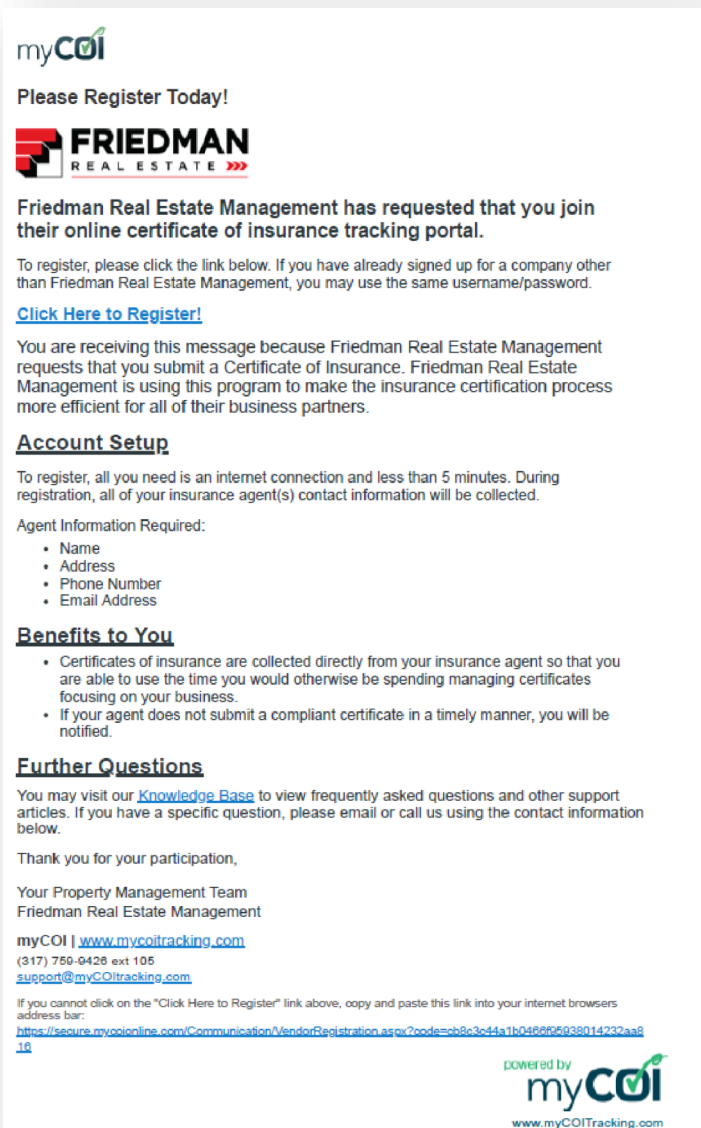
Who should I contact with questions regarding *myCOI*?

Please contact *myCOI*'s Customer Support Team via phone at (317) 759-9426 ext. 105 or via email at Support@mycoitracking.com.

MYCOI ENROLLMENT PROCESS

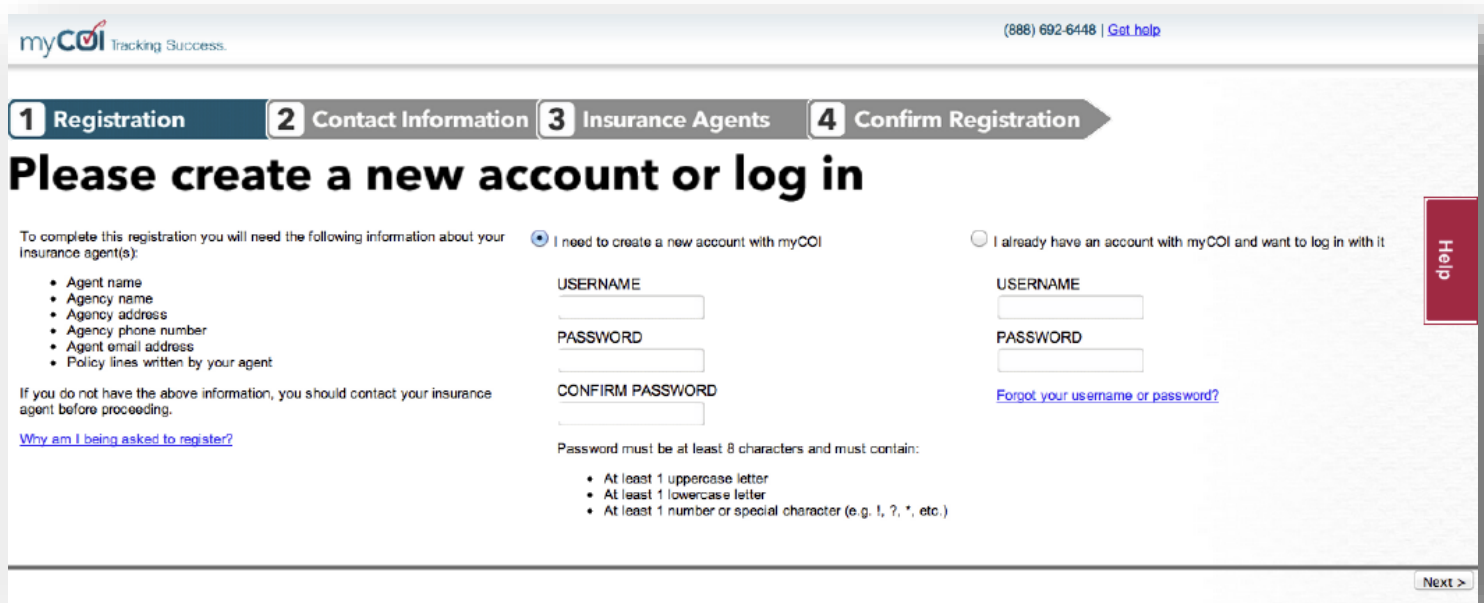
Registering for *myCOI* is quick and easy. Once you receive your email invitation to register from *myCOI*, follow the 4 steps listed below to enroll. Once you finalize enrollment, *myCOI* will reach out to your Agent(s) directly to obtain Certificates of Insurance. Should you have any questions regarding the enrollment process, please contact *myCOI* directly at (317) 759-9426 (ext. 105) or via email at support@myCOItracking.com.

SAMPLE INVITATION EMAIL



myCOI will send you an email invitation. By clicking the "Click Here to Register!" link within the email, you will be taken to *myCOI*'s registration page.

STEP 1 — CREATE AN ACCOUNT



The screenshot shows the myCOI Registration page. At the top, the myCOI logo and tagline "Tracking Success." are on the left, and the phone number "(888) 692-6448" and a "Get help" link are on the right. Below this is a progress bar with four steps: 1 Registration (highlighted), 2 Contact Information, 3 Insurance Agents, and 4 Confirm Registration. The main heading is "Please create a new account or log in".

Below the heading, there are two radio button options:

- ☒ I need to create a new account with myCOI
- ☐ I already have an account with myCOI and want to log in with it

For the "I need to create a new account" option, the following information is required:

- Agent name
- Agency name
- Agency address
- Agency phone number
- Agent email address
- Policy lines written by your agent

For the "I already have an account" option, the following information is required:

- Username
- Password

Both options have a "CONFIRM PASSWORD" field. A link "Forgot your username or password?" is available for the second option.

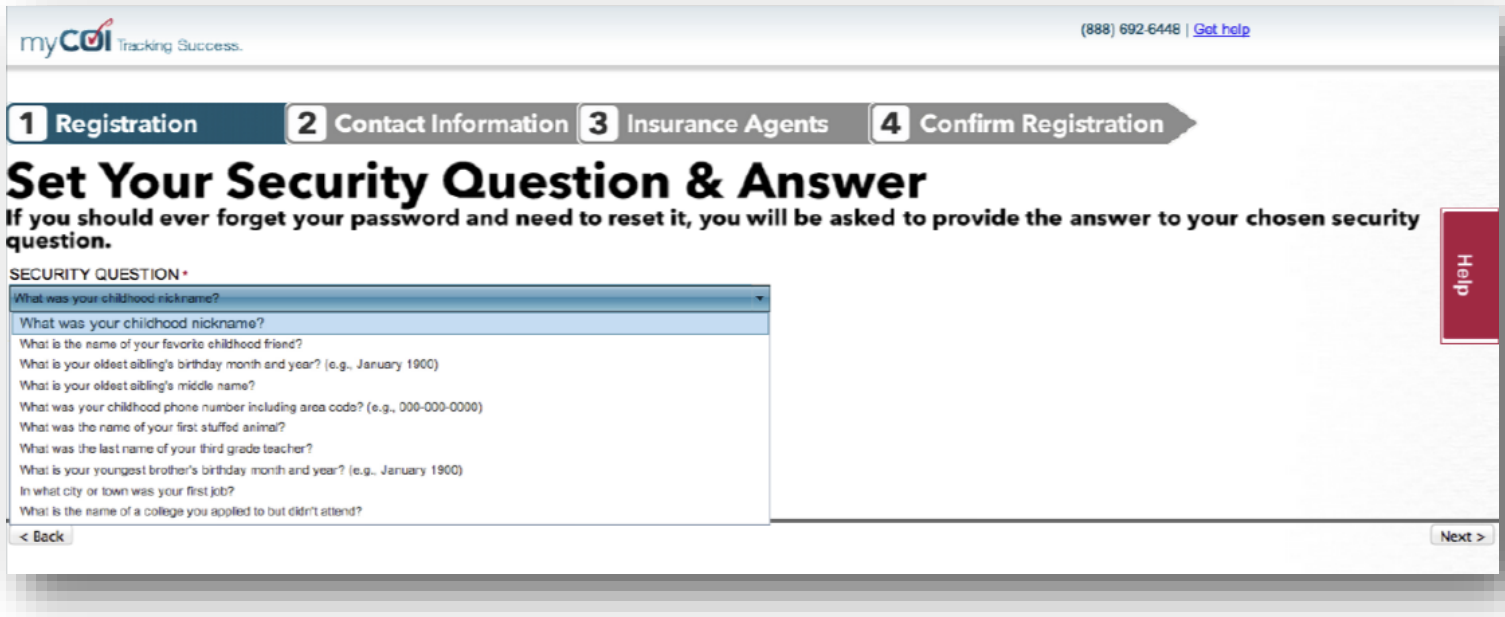
Below the password fields, a note states: "Password must be at least 8 characters and must contain:"

- At least 1 uppercase letter
- At least 1 lowercase letter
- At least 1 number or special character (e.g. !, ?, *, etc.)

At the bottom right, there is a "Next >" button. A vertical "Help" button is located on the right side of the form.

Create an account or log into your existing account. Be sure to notate your username and password somewhere so that if there are any contact information changes for your organization or your Insurance Agent, you are able to update your account accordingly.

SET YOUR SECURITY QUESTION & ANSWER



myCOI Tracking Success. (888) 692-6448 | [Get help](#)

1 Registration **2 Contact Information** **3 Insurance Agents** **4 Confirm Registration**

Set Your Security Question & Answer

If you should ever forget your password and need to reset it, you will be asked to provide the answer to your chosen security question.

SECURITY QUESTION *

- What was your childhood nickname?
- What is the name of your favorite childhood friend?
- What is your oldest sibling's birthday month and year? (e.g., January 1900)
- What is your oldest sibling's middle name?
- What was your childhood phone number including area code? (e.g., 000-000-0000)
- What was the name of your first stuffed animal?
- What was the last name of your third grade teacher?
- What is your youngest brother's birthday month and year? (e.g., January 1900)
- In what city or town was your first job?
- What is the name of a college you applied to but didn't attend?

< Back Next >

Help

Set your security question and answer so that you are able to retrieve your account in the future should you forget your username and/or password.

STEP 2 — PROVIDE COMPANY CONTACT INFORMATION

Your Contact Information

This is the person from your organization to whom myCOI will send notification regarding your compliance status.

* Indicates a required field.

COMPANY NAME *

FIRST NAME *

LAST NAME *

ADDRESS 1 *

ADDRESS 2

CITY *

COUNTRY *

UNITED STATES

STATE/PROVINCE *

ALASKA

POSTAL CODE *

PHONE *

EXT:

SECONDARY PHONE

EXT:

FAX *

I DON'T HAVE A FAX NUMBER

EMAIL *

COMPANY TAX ID

YEAR COMPANY STARTED

DO YOU HAVE EMPLOYEES IN THE FOLLOWING STATES? (CHECK ALL THAT APPLY)

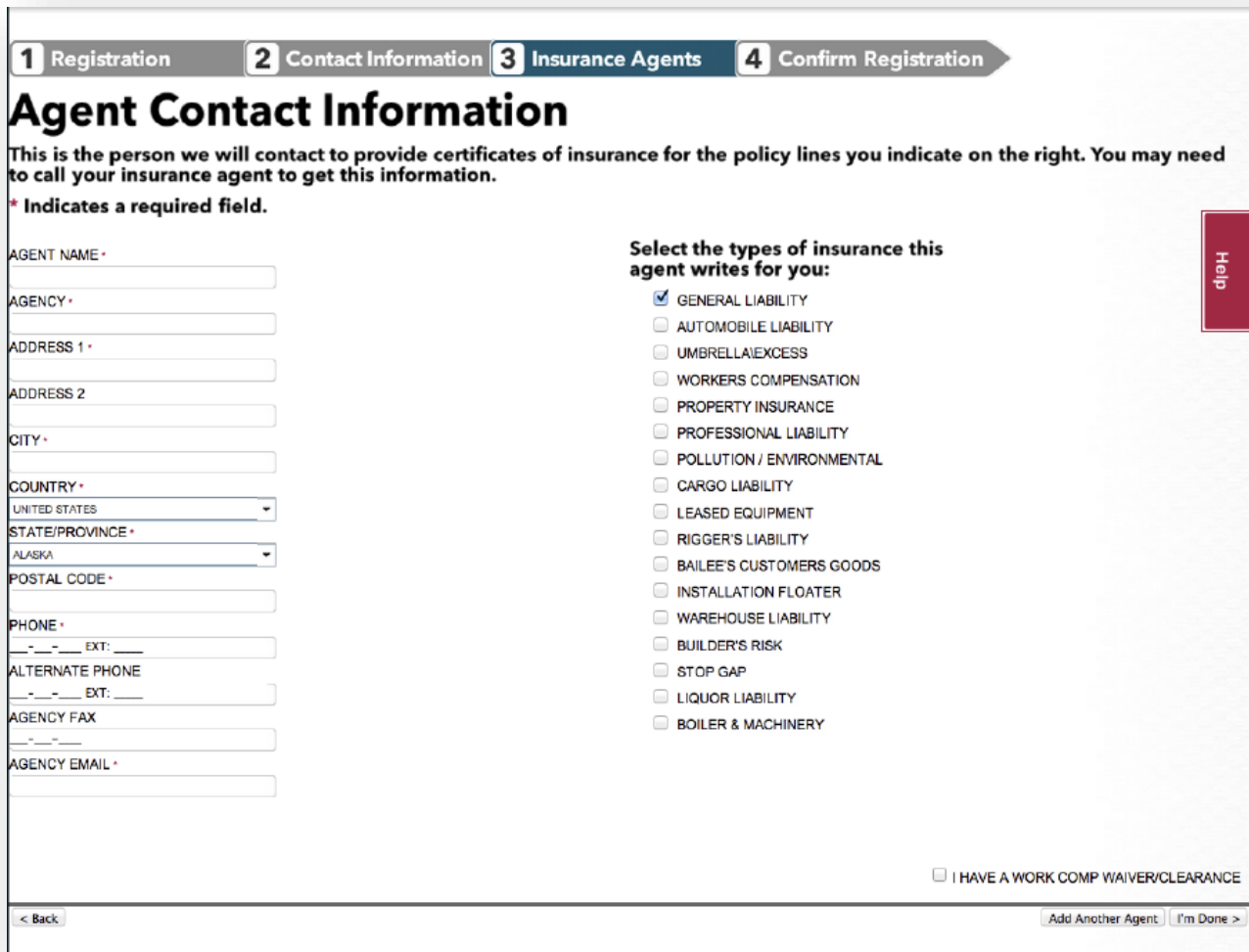
[WHAT'S THIS?](#)

☐ NORTH DAKOTA ☐ OHIO ☐ WASHINGTON ☐ WYOMING

Help

Provide your company contact information. This contact may differ from the original contact who received the registration request. On a go-forward basis, all communications from myCOI will go to this designated contact.

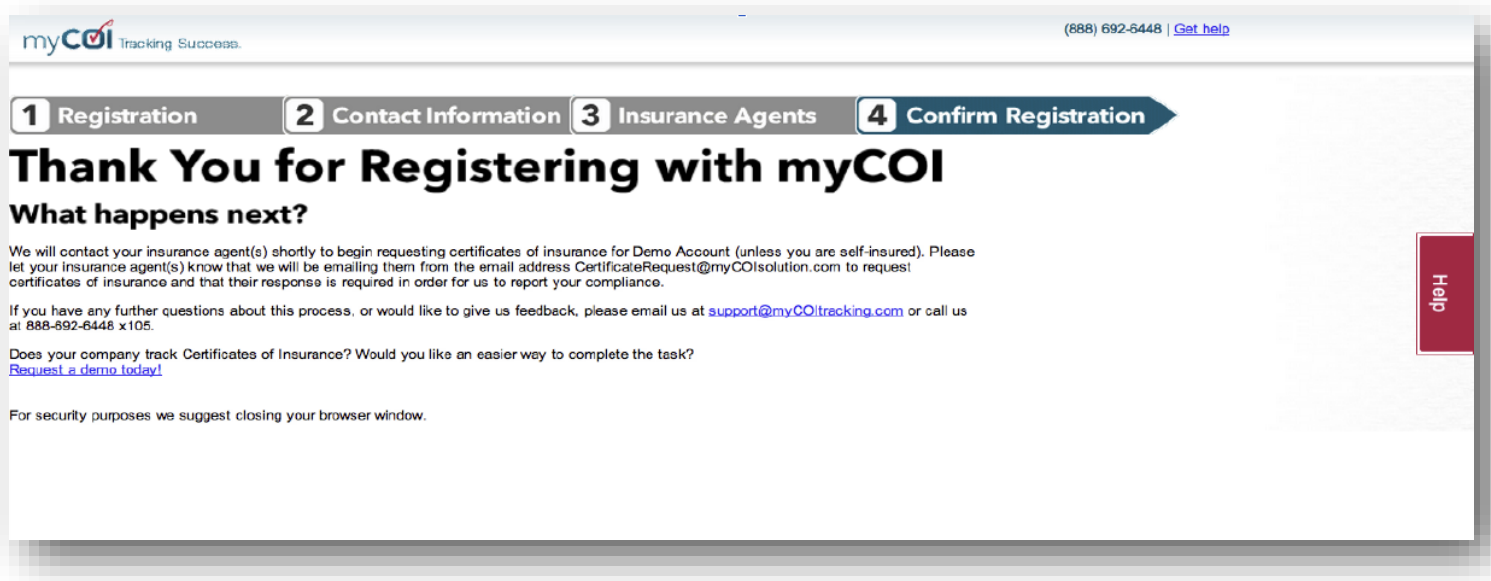
STEP 3 — PROVIDE AGENT CONTACT INFORMATION



The screenshot shows a web form titled "Agent Contact Information" with a progress bar at the top indicating four steps: 1 Registration, 2 Contact Information, 3 Insurance Agents (current step), and 4 Confirm Registration. The form includes a "Help" button on the right. The main heading is "Agent Contact Information". Below it, a note states: "This is the person we will contact to provide certificates of insurance for the policy lines you indicate on the right. You may need to call your insurance agent to get this information." A red asterisk indicates required fields. The form is divided into two columns. The left column contains input fields for: AGENT NAME*, AGENCY*, ADDRESS 1*, ADDRESS 2, CITY*, COUNTRY* (with a dropdown menu showing "UNITED STATES"), STATE/PROVINCE* (with a dropdown menu showing "ALASKA"), POSTAL CODE*, PHONE* (with a format: ___-___-____ EXT: ____), ALTERNATE PHONE (with a format: ___-___-____ EXT: ____), AGENCY FAX (with a format: ___-___-____), and AGENCY EMAIL*. The right column is titled "Select the types of insurance this agent writes for you:" and contains a list of insurance types with checkboxes: GENERAL LIABILITY (checked), AUTOMOBILE LIABILITY, UMBRELLA/EXCESS, WORKERS COMPENSATION, PROPERTY INSURANCE, PROFESSIONAL LIABILITY, POLLUTION / ENVIRONMENTAL, CARGO LIABILITY, LEASED EQUIPMENT, RIGGER'S LIABILITY, BAILEE'S CUSTOMERS GOODS, INSTALLATION FLOATER, WAREHOUSE LIABILITY, BUILDER'S RISK, STOP GAP, LIQUOR LIABILITY, and BOILER & MACHINERY. At the bottom right, there is a checkbox for "I HAVE A WORK COMP WAIVER/CLEARANCE". At the bottom left, there is a "< Back" button. At the bottom right, there are two buttons: "Add Another Agent" and "I'm Done >".

Provide your Insurance Agent(s) contact information and identify the policy lines written by the Agent(s). If you are obtaining coverage from multiple Agents, please click “Add Another Agent” on the bottom right of the screen and provide contact information for each Agent.

STEP 4 — CONFIRM REGISTRATION



The screenshot shows the 'myCOI Tracking Success' interface. At the top, there's a navigation bar with four steps: 1 Registration, 2 Contact Information, 3 Insurance Agents, and 4 Confirm Registration (which is highlighted). Below the navigation bar, the main heading reads 'Thank You for Registering with myCOI'. Underneath, it asks 'What happens next?' and provides detailed instructions: 'We will contact your insurance agent(s) shortly to begin requesting certificates of insurance for Demo Account (unless you are self-insured). Please let your insurance agent(s) know that we will be emailing them from the email address CertificateRequest@myCOIsolution.com to request certificates of insurance and that their response is required in order for us to report your compliance.' It also offers support contact information: 'If you have any further questions about this process, or would like to give us feedback, please email us at support@myCOItracking.com or call us at 888-692-6448 x105.' There's a link to 'Request a demo today!' and a question 'Does your company track Certificates of Insurance? Would you like an easier way to complete the task?'. At the bottom, it says 'For security purposes we suggest closing your browser window.' A 'Help' button is visible on the right side of the page.

Review all of the information you provided for accuracy and confirm registration. Once you confirm, *myCOI* will reach out to your Agent(s) directly to obtain Certificates of Insurance. Should you have any questions regarding the enrollment process, please contact *myCOI* directly at (317) 759-9426 (ext. 105) or via email at support@myCOItracking.com.

What is *myCOI*?

myCOI is a third-party, cloud-based system that is responsible for tracking and verifying that Certificates of Insurance (COIs) meet the requirements specified in the Tenant's lease agreement. *myCOI* will assist Landlords with managing, reviewing, and monitoring Tenant insurance as set forth in lease agreements.

Why is Friedman partnering with *myCOI*?

Friedman is partnering with *myCOI* to streamline Certificate of Insurance tracking for Tenant insurance in an effort to assist Landlords with managing, reviewing, and monitoring Tenant insurance as indicated in lease agreements.

Who is required to register for *myCOI*?

Registering for *myCOI* is **mandatory** for all Tenants.

What are the benefits for registering for *myCOI*?

Registering for *myCOI* is quick and easy. Below are some benefits for registering for *myCOI*:

- **Fully Automated COI Tracking**— *myCOI* makes the Tenant compliance process paperless for you. The Insurance Specialists at *myCOI* work directly with your Agent(s) so you don't have to.
- **Renewal Reminders**— Once you complete the *myCOI* registration process, *myCOI* will manage the expiration and renewal process directly with your Insurance Agent(s), eliminating the need for you to send updated certificates of insurance.

What happens after I register for *myCOI*?

After you confirm registration, *myCOI* will begin working directly with your Insurance Agent(s) on file to obtain Certificates of Insurance. Agents will receive email communications directly from *myCOI* with the requested information and will provide uploading instructions.

Do I still need to provide Certificates of Insurance to Friedman after I register for *myCOI*?

By registering for *myCOI*, you no longer need to provide Certificates of Insurance directly to Friedman, making the process paperless for you. *myCOI* will work directly with your Agent(s) to obtain the necessary documents, which will be uploaded directly in the Agent Portal, making it paperless for your Agents as well.

What happens if I refuse to register for *myCOI*?

All Friedman Tenants are required to register for *myCOI*. Tenants that do not register for *myCOI* could go into default pursuant to the lease agreement at the discretion of the Landlord.

What happens if I register for *myCOI*, but I am not compliant?

All Friedman Tenants are required to meet the requirements specified in the Tenant's lease agreement. Tenants that do not meet the specified insurance requirements could go into default pursuant to the lease agreement at the discretion of the Landlord.

Who should I contact with questions regarding *myCOI*?

Please contact *myCOI*'s Customer Support Team via phone at (317) 759-9426 ext. 105 or via email at Support@mycoitracking.com.

What is myCOI?

myCOI is a third-party system that is responsible for tracking and verifying that Certificates of Insurance (COIs) meet the requirements specified in the Tenant's lease agreement. *myCOI* will assist Landlords with managing, reviewing, and monitoring Tenant insurance as set forth in lease agreements. Registering for *myCOI* is **mandatory** for all Friedman Tenants.

As an Agent, what is my role within myCOI?

All Friedman Tenants are required to register for *myCOI*. As an Agent, we ask that you utilize the Agent Portal to upload the requested documents for our mutual client in order for *myCOI* to track and verify that Certificates of Insurance meet the requirements specified in the lease agreement.

I received an email indicating that an "Insured has Registered" - What now?

This email is an introduction that one of your insureds has registered with *myCOI* for certificate tracking. You do not need to do anything at this time. You will receive a certificate request containing a link that will provide you with all of the information needed to provide a compliant certificate of insurance.

I received a certificate request email, but I cannot find the address for the certificate holder. Where can I locate this?

The certificate holder address and insurance requirements can be found by clicking the "Go to Portal" button in the Certificate Request email. From there, click "New Certificate Request" to see the certificate holder's name and insurance requirements for each request listed. Once you click on a specific request, you will find the certificate holder address by clicking the "View Requirements" button.

How can I submit the Certificate of Insurance requested?

Uploading certificates of insurance through the Agent Portal is the quickest and most efficient way to submit the requested certificate of insurance. Once you receive your email request and click the "Go to Portal" button, click "New Certificate Request" and select the request you'd like to upload a certificate of insurance for. Once you are on a specific request, click "Upload" and select the document(s) to upload. Document uploads occur in real time and further email requests will terminate.

I received a Non-Compliant Notice. What is wrong with the certificate provided?

This information is accessible through the link in the email sent by *myCOI*. Click on the link to be taken to the Agent Portal—once you are in the Agent Portal, click on "Non-Compliant Requests" to see a list of accounts that need to be reviewed. When a request is clicked, you will see the non-compliant items listed on the right side of the screen, along with the documents you previously provided.

I do not write the policy line being requested. What should I do?

If you receive a certificate request for a policy link you do not write, you can notify *myCOI* in a matter of seconds and prevent further requests from being sent to you. To do so, please follow these steps:

1. Click the "Do Not Write Policy?" button
2. Click "No" next to the line(s) you do not write

What are the various request statuses in the Agent Portal and what do they mean?

There are several different statuses in *myCOI*. Each request can have one of the following statuses:

- **New Certificate Request:** A new certificate is being requested based on the contractual insurance requirements provided by the certificate holder. Click each certificate holder listed to view insurance requirements for this request and upload the requested certificates and/or endorsements.
- **Non-Compliant:** The certificate/endorsements were reviewed and need to be updated for compliance (the date on the non-compliant notes is the day they were reviewed). Non-compliant notes are sent out because the certificate on file does not match the insurance requirements provided by the certificate holder. Click each Certificate Holder listed to review non-compliant notes and upload a revised certificate and/or endorsements.
- **Renewal Certificate Needed:** A policy you write is expiring/expired. Click each Certificate Holder listed to review the insurance requirements. When the renewal is completed, please upload a renewal certificate and/or endorsements.
- **Policy Confirmation Needed:** The Certificate Holder has requested that we confirm that no policies have been cancelled or materially changed on a quarterly basis. Please click the Certificate Holder listed to view the certificate previously submitted and confirm the policies.
 - You can view previously submitted COIs and documents on file. If policies are active, click "Click to Confirm Policies on File" button.
- **Pending Review:** Certificates/endorsements have been received and are in the compliance review process, at this time. We will email you if anything further is needed.
- **Compliant:** The certificates received are compliant. Thank you for your assistance!
- **Inactive Requests:** The Certificate Holder has inactivated these requests. Certificates are no longer needed.

Who should I contact with questions regarding *myCOI*?

Please contact *myCOI*'s Customer Support Team via phone at (317) 759-9426 ext. 105 or via email at Support@mycoitracking.com.

TENANT CONTACT FORM



TENANT CONTACT INFORMATION

DATE:

Company Name:

Main Company Phone#:

Leased Addresses/Suite(S):

Of Full-Time Day Staff:

City /State/Zip:

Of Full-Time Evening Staff:

Type Of Business:

CONTACT INFORMATION (PROVIDE: 1. PRIMARY 2. SECONDARY 3. THIRD FOR EACH)

ON-SITE CONTACT(S): (routine business, maintenance and repair requests, lock changes, tenant events)

NAME	EMAIL	PHONE #	CELL #
1.			
2.			
3.			

ACCOUNTING CONTACT(S): (rental payments, payment issues, etc.)

NAME	CITY	STATE	ZIP	EMAIL	PHONE #
1.					
2.					
3.					

CORPORATE LEGAL/LEASING/ADMINISTRATIVE CONTACT(S): (contracts & miscellaneous)

NAME	CITY	STATE	ZIP	EMAIL	PHONE #
1.					
2.					
3.					

INSURANCE CONTACT: (tenant insurance agent or person responsible for insurance)

NAME	CITY	STATE	ZIP	EMAIL	PHONE #
1.					

AFTER HOURS EMERGENCY CONTACTS:

NAME	EMAIL	PHONE #	CELL #
1.			
2.			
3.			

*If you would like to receive text messages regarding building emergencies (i.e. power outages, water maintenance, etc.), please check the box next to your cell phone number. Standard text messaging rates will apply, if applicable, from your wireless carrier.

FLOOR FIRE WARDEN: (responsible for coordinating policy & procedure for office emergency & fire drills during business hours)

NAME	CITY	STATE	ZIP	EMAIL	PHONE #
1.					
2.					
3.					

Please email this completed form to servicedesk@freg.com