

2026

# AEGIS Renewables Online Broker Training Guide

ARO TRAINING GUIDE – MARCH 17, 2026 EDITION

AEGIS INSURANCE SERVICES, INC. | 30 Hudson Street, Jersey City, NJ 07302

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# 1. Introduction

This user guide has been developed to help new users access and use the AEGIS Renewables Online platform. The link to the platform is <https://broker.aegisrenewables.com/>.

# 2. Questions & Support

There are two separate help desks: one for login and access issues, and another for any problems encountered within the platform itself. Below is the contact information for each team, along with a brief description of the types of issues they can assist with:

<b>Helpdesk:</b>		<b>Underwriting:</b>
For help with username / password / logging in:	For help with a technical issue in ARO:	For questions around pricing, underwriting responses, new features, etc.:
<a href="mailto:portalsupport@aegisltd.com">portalsupport@aegisltd.com</a>	<a href="mailto:AROSupport@aegislondon.zohodesk.eu">AROSupport@aegislondon.zohodesk.eu</a>	<a href="mailto:AROUnderwriting@aegisltd.com">AROUnderwriting@aegisltd.com</a>

# 3. Logging In

To log into the platform, follow these steps:

## A. Step 1 – Okta Account Setup

If you haven't set up your AEGIS account yet (used for AEGIS Link and AEGIS Renewables Online), you'll receive an email from Okta once your platform access has been granted. Please locate that email in your inbox (be sure to check Promotions or Spam) and follow the instructions to complete your account setup.

## B. Step 2 – Navigate to AEGIS Renewables Online

After setting up your Okta account, navigate the platform by clicking the following link: <https://broker.aegisrenewables.com/>. Please add this to your bookmarks so you can easily find it in the future.

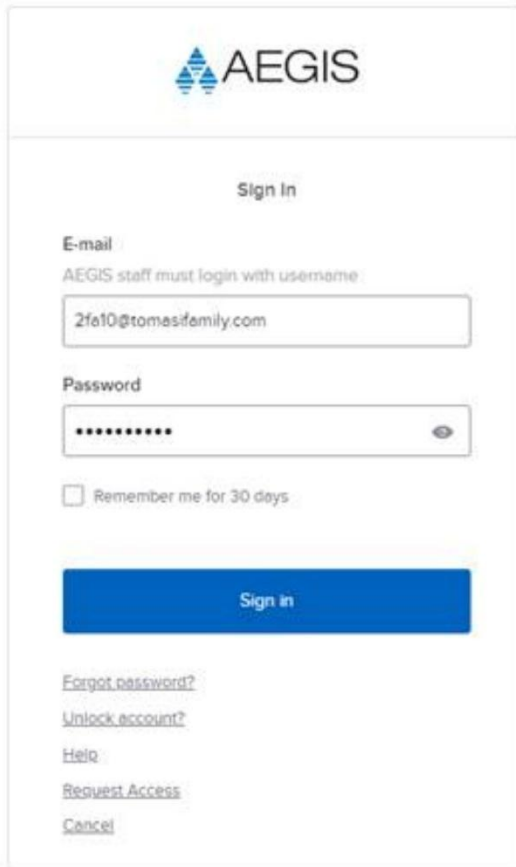
## C. Step 3 – Log In

Click "Log In" which will take you to the screen where you will be able to enter your username and password.



#### D. Step 4 – Enter Credentials

Enter your username and password.



The screenshot shows the AEGIS Sign In page. At the top is the AEGIS logo. Below it is the heading "Sign In". The "E-mail" section includes the instruction "AEGIS staff must login with username" and a text input field containing "2fe10@tomasifamily.com". The "Password" section has a text input field with masked characters and a toggle icon. Below the password field is a checkbox labeled "Remember me for 30 days". A blue "Sign in" button is positioned below the checkbox. At the bottom, there are links for "Forgot password?", "Unlock account?", "Help", "Request Access", and "Cancel".

**AEGIS**

**Sign In**

**E-mail**  
AEGIS staff must login with username

2fe10@tomasifamily.com

**Password**

.....

Remember me for 30 days

**Sign in**

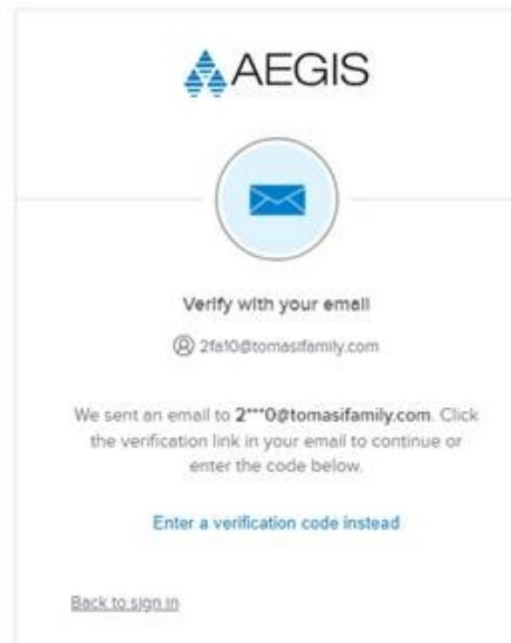
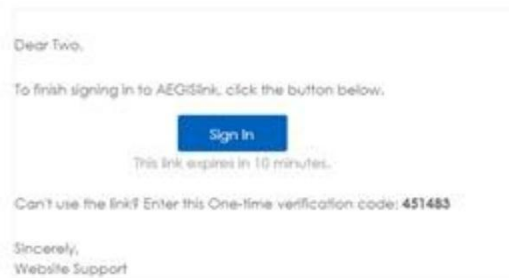
[Forgot password?](#)  
[Unlock account?](#)  
[Help](#)  
[Request Access](#)  
[Cancel](#)

## E. Step 5 – Multi-Factor Authentication

For security purposes, you will be prompted to send yourself an email to verify your identity. Click the “Send me an email” button.



You'll then receive an email containing a one-time verification code. Enter this code on the AEGIS login screen. Alternatively, you can simply click the “Sign In” button in the email to bypass entering the code manually.



## 4. Setting up an Account

Prior to setting up / binding a policy, you have to set up an account page which outlines the contact information for the First Named Insured.

### A. Step 1 – Get a Quote

Click get a quote, this is located in the top of the navigation bar on the left hand side of the screen. You can also navigate to the “All Accounts” to create an account.

Master program ID	Insured Name	Status	Program Name	# of declarations	Inception Date	Expiry Date	Premium	Actions
# DE1000000000000111P	Performance Testing Part 2	Live policy	P1	5	4 days ago 08/05/2025	in 12 months 08/05/2026	\$14,467.00	👁
# DE1000000000000110P	P1H	Live policy	Broker Test	1	in 13 days 08/22/2025	in about 1 year 08/22/2026	\$1,026.00	👁
# DG1000109P	P1H	Live policy	DE Test	1	in 4 days 08/13/2025	in about 1 year 08/13/2026	\$330.00	👁
# DG1000108P	MAWP Rater Testing	Live policy	MAWP Rater Testing	1	6 days ago 08/03/2025	in 12 months 08/03/2026	\$145,414.00	👁
# DG1000107P	P1H	Live policy	2 Declarations	2	6 days ago 08/03/2025	in 12 months 08/03/2026	\$1,717.00	👁
			Extend non		9 days	in 12		⌵

### B. Step 2 – Create a New Account

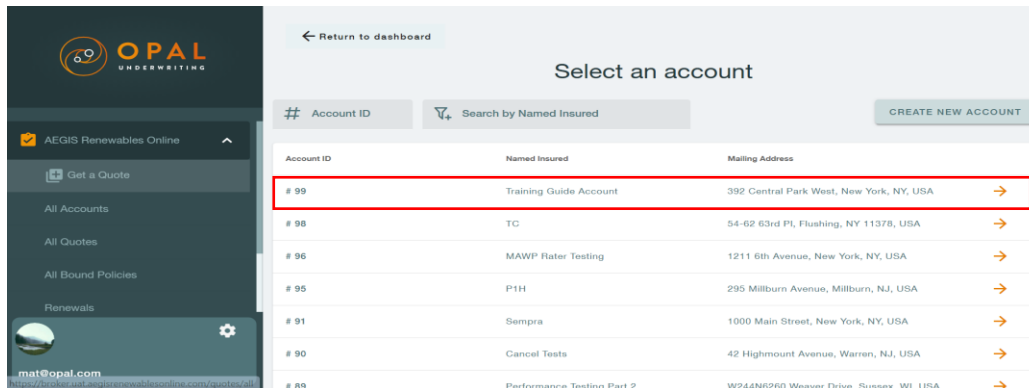
1. Click “Create a New Account” located on the upper right hand of the screen
2. You will be taken to the New Account Screen, please complete the fields:
  - Named Insured – Enter the Named Insured you would like to show on the policy
  - Ultimate Parent – This should be the entity that owns the majority stake in the company
  - Mailing Address – You may either type the address into the auto-fill field or tick “Manually enter the address” if you want to amend the address or add a suite number or any correcting or qualifying information.
3. Finally, click the “Create Account” icon in the bottom right of the screen

## 5. Creating the First Master Program

After you have completed the steps outlined in the “Create New Account” section, you will then create a Master Program (aka a Master Policy).

### A. Step 1 – Select the Newly Created Account

1. Move your cursor to the newly created account and click the orange arrow on the right hand side of the screen



### B. Step 2 – Create the first Master Program

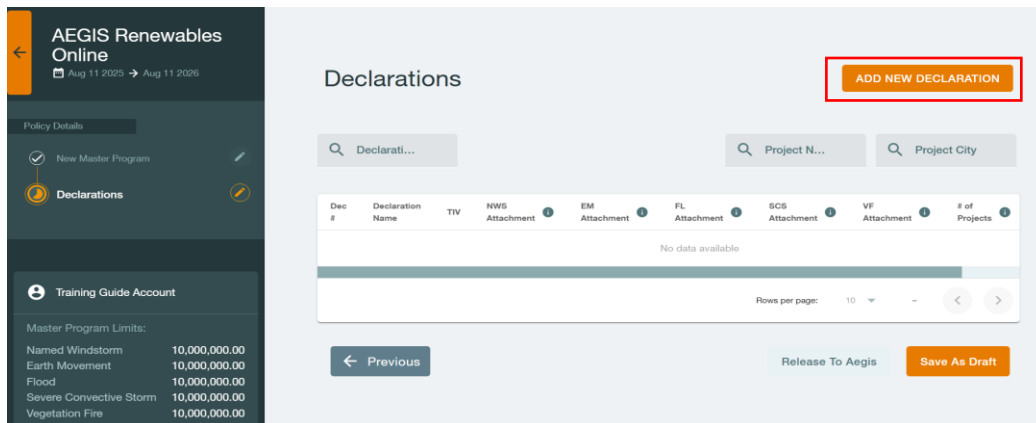
To create the first Master Program, complete the fields on the “New Master Program” screen:

1. Program Name – Provide a name to identify the master program
2. Program Period – select the inception date desired and the expiration date will automatically update to reflect a 12 month policy period.
3. Master Annual Aggregate limits for CAT – fill in the requested limits for each CAT peril. Each Declaration Page / Project you will eventually attach to the policy (see next sections) will share these CAT limits. A few things to note for CAT limits:
  - A limit of up to \$10M in the Annual Aggregate may be requested (however the limit may not exceed the TIV of all assets insured under the policy. As more TIV is added to the policy this limit may be amended via endorsement.
  - A limit over \$5M in the Annual Aggregate will refer to AEGIS for review.
4. Complete Home State Information – This is where all surplus lines information is completed (a Home State Certificate will be generated at the time of binding for your files).
5. Once all fields are complete, click “Next”.

## 6. Creating the First Declaration Page

At this stage, you'll see a table intended to display all declaration pages in the draft quote. Because you haven't created any yet, the table will be empty. First, we need to create your initial Declaration Page; afterward, you can add your first project location.

### A. Step 1 – Click “Add New Declaration”



### B. Step 2 – Complete the fields on the “#1 Declaration” screen

1. Declaration Name – provide a name to identify the Declaration Page and what projects are insured under it (e.g. California Locations, High Hazard Projects, Solar Projects, Construction Projects, etc.)
2. Declaration Annual Aggregate Limits for CAT – fill in the requested CAT limits for projects attaching to this declaration page. These limits are part of and not in addition to the CAT Aggregate limits that were set at the Master Program Level.
3. CAT Deductibles and Waiting Periods – fill in the requested CAT attachment points for each peril. Declaration pages are where you set these attachment points for the projects attaching to that dec page (e.g. if you had a subset of High Risk projects and you wanted to obtain a lower premium, you might think about isolating those projects under a separate declaration with higher CAT deductibles).
4. Terror Coverage – Select Yes or No if you would like the projects attaching to this declaration to have Terrorism Coverage. Note that separate declarations may or may not purchase Terrorism.
5. Click “Save Declaration” to add this First Declaration Page to the quote.

### C. Step 3 – If addition Declaration Pages are needed

1. repeat the instructions from “A. Step 1...” of this section.

## 7. Adding Projects to the Quote

After completing your first Declaration Page, you can add projects in two ways:

1. Before saving the declaration:  
Select the Projects tab at the top of the screen before clicking Save Declaration (see Section 6). The platform will prompt you to confirm saving your changes. Click Confirm and Proceed.
2. After saving the declaration:  
Click Save Declaration as described above. You'll be taken to the Declarations screen, which lists all declarations attached to the policy. Click the pencil icon on the right side of the row for Declaration #1 (you may need to scroll horizontally). If multiple declarations exist, select the one you want to add projects to.

The screenshot displays the AEGIS Renewables Online interface. On the left is a dark sidebar with a navigation menu including 'Policy Details', 'New Master Program', 'Declarations', and 'Training Guide Account'. The 'Declarations' section is active, showing 'Declaration - Training Guide Dec 1'. The main content area is titled '#1 Declaration - Training Guide Dec 1' and features two tabs: 'LIMITS' and 'PROJECTS', with the latter highlighted by a red box. Below the tabs, there are input fields for 'Declaration Name' (containing 'Training Guide Dec 1'), 'Named Windstorm (NWS)' (with sub-fields for Limit: US\$10,000,000.00, Deductible: 2.5%, and Waiting Period: 30 Days), and 'Earth Movement (EM)' (with sub-fields for Limit, Deductible, and Waiting Period).

Then click the “Projects” tab at the top of the page (just like you would via the first route described above). We can then add our first project(s):

### A. Add a Project Manually:

If you would like to add a single project at a time, you can click “Add Project Manually” in the top right hand corner of the screen (lighter orange button). Then complete the following fields:

3. **Project Name** – what name should be used to identify this location?
4. **Location Details of project site** – you can either provide the Geolocation Coordinates (aka Latitude and Longitude) or type in the address of the project site. A manual option is available if you would like to override the auto-fill feature.
5. **What coverage is required** – Select if the project requires Hybrid Construction / Operating All Risk Coverage, or just Operating All Risk Coverage. You will also select if the insured is purchasing standalone Property Damage Coverage, or Property Damage and Time Element Coverage.

6. **Substantial completion date** – If Hybrid Construction / Operating All Risk Cover is selected, you will then have to provide the date substantial completion is estimated to be reached. You will only have to update this date if the project is delayed into the next policy period, after which you would update to reflect the newly estimated date.
7. **Which asset class is being insured** – Select the asset class being insured. See section 10. for a description of the various asset classes that are insured within this platform. For sites with multiple asset classes, please enter each asset and the corresponding values as a separate project site with the same Project Name. The following asset classes are not currently insured under this platform:
  - Solar: Rooftop – Residential: This may be added in the future
  - Solar: Ground Mount – Single Axis Tracker (2P): This configuration has repeatedly shown a high failure rate from wind speeds well below the tracker design rating, as such it requires a more through underwriting not available on this platform. Reach out to your AEGIS underwriter directly for a quote for this asset class.
8. **What is the Physical Damage replacement cost** – Please provide the physical damage values for the Project site. If the Project has multiple asset classes, please only provide the Physical Damage values for that portion of the project being entered (e.g. if the site has a carport and a rooftop installation, the location should be entered as two separate projects and the values for each entry should be limited to that portion of the values being insured, to the best of your ability).
9. **What is the required Physical Damage Deductible** – enter the per occurrence physical damage deductible (minimum of \$25,000 per occurrence). This deductible does not override any CAT deductibles that might apply based on what was entered at the declaration page level.
10. **Anticipated Gross Profit over the next 12 months** – enter the anticipated annual gross profit for the project.
11. **Please select a Time Element Waiting Period** – enter the desired waiting period (minimum of 30 days). This waiting period does not override any CAT waiting periods that might apply based on what was entered at the declaration page level.
12. **Have any losses in excess of the requested deductibles occurred in the past 5 years** – answer yes or no. If you answer yes two additional questions will appear and the project addition will automatically refer to an underwriter:
  - Please provide the total amount of loss – while the original question asked if the loss occurred in excess of the deductibles being requested, this question requests the ground up loss amount.
  - Please provide a brief description of the loss – include details of the loss including but not limited to the date and time of the event, the primary cause of loss (e.g. electrical fire, hail, wind, grassfire, etc.), equipment impacted, total downtime, and any other relevant information. More information might be required from the referral underwriter.
13. **Hit Submit** – Hit Submit to add the location to the quote.

The screenshot shows the AEGIS Renewables Online declaration form. The left sidebar contains navigation options like 'Policy Details', 'New Master Program', and 'Declarations'. The main form area includes the following sections and callouts:

- 1**: Project Name input field.
- 2**: Location details of project site dropdown menu.
- 3**: What coverage is required? dropdown menu.
- 4**: Substantial completion date dropdown menu.
- 5**: Which asset class is being insured? selection area with various solar and BESS options.
- 6**: Physical damage replacement cost input field.
- 7**: Physical damage deductible input field.
- 8**: Anticipated Gross Profit over the next 12 months input field.
- 9**: Time element waiting period dropdown menu.
- 10**: Have any losses in excess of the requested deductibles occurred in the past 5 years? Yes/No selection buttons.

At the bottom right, there are 'CANCEL' and 'SUBMIT' buttons, with a red callout '1' pointing to the SUBMIT button.

## B. Upload from XLS:

If you want to add multiple projects at once, click **Upload from XLS** in the top right corner (the dark orange button). The file must be in the ARO SOV format. If your SOV isn't already in this format, click **Download Template** in the upper right corner. The template will download to your computer, and you can transfer your project data into it (see Section 9 for tips on doing this).

- Each column within the SOV template matches the questions outlined in the “Add a Project Manually” section. Refer to each entry within that section for any questions. Conditional formatting will grey out questions that are not required based on already answered questions.
- Once the SOV has been uploaded, click “Save Declaration” in the in the bottom right-hand corner of the screen.
- If the request includes a larger number of locations (over 500) it may take up to a minute to validate that there are no errors in the information provided.

## 8. Release to AEGIS

After adding the Declaration Page(s) and Project(s) and configuring the quote as needed, click **Release to AEGIS** (the gray button at the bottom of the screen, to the left of **Save as Draft**). This will send any referrals to an AEGIS underwriter for review. A confirmation screen will appear asking you to affirm that the submitted information is accurate to the best of your knowledge and that there are no known or reported circumstances that could lead to a claim. If no referrals are triggered, you can proceed to bind the quote.

## 9. Binding the Quote

You will receive an email notifying you that your quote is now ready to bind (if any referrals were triggered this might take a little longer. A few things to consider prior to clicking **Bind Quote**:

1. Amendments Prior to Binding - If you would like to make further changes to the quotation, click "Modify Quote" in the upper right-hand corner of the screen (next to the "New Activity +" button). Note that any changes could result in additional referrals being sent off to AEGIS. To swap between versions click the caret next to "Revision: #".
2. To review you quote and the accompanying documentation (SOV, Draft Home State Certificate) click on the "Documents" button. Click the downward pointing arrow icons on the right side of the screen to download and view the documents.
3. Commission – The quote will default to 15% commission, but if you would like to net that down you may do so by clicking on the "Net Down Quote" button on the bottom right hand side of the screen. You will be presented with a sliding scale that will automatically adjust the premium based on what you select. Click "Save Price" once you are done and the quote will update to reflect this change.

← Return to dashboard

## Master Quote Summary

Quote: **DE1667000023P** Insured Name: Training Guide Renewables LLC

Revision: #2 ▾

 **Modify Quote**

**NEW ACTIVITY +**

OVERVIEW

DETAILS

DECLARATIONS & PROJECTS

**DOCUMENTS** <sup>3</sup>

ACTIVITIES

Training Guide - Master Program



**US\$36,908.00**

Current total gross premium



**Quote**

Status



02/01/2026 → 02/01/2027

Inception date / Expiry date

BIND QUOTE



I confirm that all information entered is correct to my knowledge and there are no known or reported circumstances that could lead to a claim.




**NET DOWN QUOTE** <sup>3</sup>

When you're satisfied with the terms and conditions, check the box confirming that the information you've provided is accurate to the best of your knowledge and that there are no known or reported circumstances that could lead to a claim. Then select **Bind Quote** in the lower-left corner of the screen. At this stage, you may adjust the effective dates if they have changed since the quote was created.

# Master Quote Summary

Quote: **DE16670000023P** Insured Name: Training Guide Renewables LLC

Revision: #2 ▾


 **Modify Quote**

**NEW ACTIVITY +**

OVERVIEW

ACTIVITIES

Please confirm the inception date is correct before binding this quote. ✕

Inception date: Feb 01 2026 

 **EDIT**

Expiry date: Feb 01 2027 

**BIND QUOTE**

Current total gross premium

Quote

Status

02/01/2026 → 02/  
Inception date / Expiry

**BIND QUOTE**



I confirm that all information entered is correct to my knowledge and there are no known or reported circumstances that could lead to a claim.

## 10. Processing Endorsements

After binding, you can process 17 different endorsements within the system. To access them, open the Endorsements tab on the Master Policy Summary screen. Each endorsement is listed with a description and any required processing steps.

Depending on the nature of the change, some endorsements may require underwriting review. Underwriters may decline an endorsement at their discretion; however, they will make every effort to clearly communicate the reason for the declination and outline what would need to be adjusted in order to bind. For any questions, please contact [ARUnderwriting@aegislimited.com](mailto:ARUnderwriting@aegislimited.com).

**Note:** Be sure to select the endorsement's effective date (at the top of the screen) before clicking Submit.

# Master Policy Summary

Live policy: **DE1667000023P** Insured Name: Training Guide Renewables LLC

Revision: 4

[NEW ACTIVITY +](#)

[REQUEST CANCELLATION](#)

OVERVIEW

DETAILS

DECLARATIONS & PROJECTS

DOCUMENTS

**ENDORSEMENTS**

ENDORSEMENT HISTORY

ACTIVITIES

[Add endorsements](#)

Amend Mailing Address

Amend Mailing Address

Note:

## A. Amending Mailing Address

### REFERRAL – NO

Use to amend the mailing address of the Master Policy. If the Account level insured address needs to be amended to the Account Summary screen and click “Modify”.

The screenshot shows the 'Amend Mailing Address' form within the 'ENDORSEMENTS' tab. The form includes a navigation menu on the left with options like 'Amend Mailing Address', 'Amend Named Insured', and 'Policy Extension'. The main form area contains a 'Note' box stating that changing the mailing address only affects this program. Below the note is an 'Effective Date' field set to 'Feb 03 2026'. The 'Mailing Address' section has a search bar with the address '1211 6th Avenue, New York, NY, USA' and a 'Manually enter the address' checkbox. The address fields are pre-filled with: Street Number (1211), Street Name (6th Avenue), Town/City (New York), ZIP (10036), and Country (United States). A 'SUBMIT ENDORSEMENT' button is located at the bottom right.

## B. Amend Named Insured

### REFERRAL – NO

Use to amend the Named Insured of the Master Policy. If the Account level name needs to be amended to the Account Summary screen and click “Modify”.

The screenshot shows the 'Amend Named Insured' form within the 'ENDORSEMENTS' tab. The left sidebar lists various endorsement options, with 'Amend Named Insured' selected. The main form area includes a 'Note' box stating that changing the First Named Insured only affects the current program. Below this is an 'Effective Date' field set to 'Feb 01 2026'. The 'Named Insured' section has an 'Account Name' field containing 'Training Guide Renewables Co.'. A 'SUBMIT ENDORSEMENT' button is located at the bottom right.

## C. Manuscript Request

### REFERRAL - YES

While this endorsement is available, the level of customization built into the platform means it should be used only as a last resort. Regardless of content, this endorsement will always refer to underwriting and may be declined at the underwriter’s discretion.

The screenshot shows the 'Manuscript Request' form within the 'ENDORSEMENTS' tab. The left sidebar lists various endorsement options, with 'Manuscript Request' selected. The main form area includes an 'Effective Date' field set to 'Feb 10 2026'. Below this is a 'Manuscript Request' text area with the prompt 'Enter description of what is being requested or proposed Policy Wording'. A 'SUBMIT ENDORSEMENT' button is located at the bottom right.

## D. Amend Master Aggregate Limits

### REFERRAL – Depends on Limits Selected

Limits up to \$5M in the Annual Aggregate for any peril will not trigger a Referral, however anything above \$5M in the Annual Aggregate will be escalated to the underwriter for their review.

OVERVIEW DETAILS DECLARATIONS & PROJECTS DOCUMENTS **ENDORSEMENTS** ENDORSEMENT HISTORY ACTIVITIES

**Add endorsements**

- Amend Mailing Address
- Amend Named Insured
- Manuscript Request
- Amend Master Aggregate Limits**
- Policy Extension
- Add Loss Payees or Sole Loss Payees
- Remove Loss Payees or Sole Loss Payees
- Add Additional Insureds
- Remove Additional Insured or Additional Named Insured
- Amend Master Name
- Amend Declaration
- Add new Declaration
- Remove Declaration
- Add Project(s)
- Remove Project(s)

### Amend Master Aggregate Limits

Effective Date: Mar 01 2026

Annual Aggregate Limit required for:

<b>Named Windstorm</b> Limit: US\$10,000,000.00	<b>Earth Movement</b> Limit: US\$5,000,000.00
<b>Flood</b> Limit: US\$5,000,000.00	<b>Severe Convective Storm</b> Limit: US\$10,000,000.00
<b>Vegetation Fire</b> Limit: US\$5,000,000.00 <small>Set the Vegetation Fire limit to be shared amongst all project sites attaching to this Master Program (not applicable to Project Sites in California).</small>	

**SUBMIT ENDORSEMENT**

## E. Policy Extension

**REFERRAL** – Depends on length / timing of extension

Extensions of up to six months are allowed without referral once the renewal placement has been generated in the system (30 days before expiration). Prior to that point, any extensions will require referral. Any extensions exceeding six months—regardless of timing—will also be referred. When processing this endorsement, you must include the reason for the extension.

OVERVIEW DETAILS DECLARATIONS & PROJECTS DOCUMENTS **ENDORSEMENTS** ENDORSEMENT HISTORY ACTIVITIES

**Add endorsements**

- Amend Mailing Address
- Amend Named Insured
- Manuscript Request
- Amend Master Aggregate Limits
- Policy Extension**
- Add Loss Payees or Sole Loss Payees
- Remove Loss Payees or Sole Loss Payees
- Add Additional Insureds
- Remove Additional Insured or Additional Named Insured
- Amend Master Name
- Amend Declaration
- Add new Declaration
- Remove Declaration

### Policy Extension

Effective Date: Jan 30 2027

Expiry Date: Apr 01 2027

**Reason for Extension**

Reason for Extension: Looking to align renewal dates between all insurance programs.

**Inception Date**

Jan 31 2026 (in 10 days)

**SUBMIT ENDORSEMENT**

## F. Add Loss Payee or Sole Loss Payee

### REFERRAL – NO

After entering the effective date, click Add Loss Payee. This will create a grey bar showing the number of the Loss Payees being added, along with a Remove button you can use to delete any entries added in error. As shown below, you can add multiple Loss Payees or Sole Loss Payees (also known as Lender Loss Payees) within a single endorsement. These entries will populate a chart that corresponds to the Lender Consultant–approved Sole Loss Payee wording in the base form.

The screenshot shows the 'Add Loss Payees or Sole Loss Payees' form. At the top, there are navigation tabs: OVERVIEW, DETAILS, DECLARATIONS & PROJECTS, DOCUMENTS, ENDORSEMENTS (active), ENDORSEMENT HISTORY, and ACTIVITIES. On the left, a sidebar lists various actions, with 'Add Loss Payees or Sole Loss Payees' highlighted. The main form area has a title 'Add Loss Payees or Sole Loss Payees' and an 'Effective Date' field set to 'Feb 26 2026'. Below this, there are two rows, each with a grey bar containing a number (#1 and #2) and a 'REMOVE' button. At the bottom of the form is an 'Add Loss Payee' button and a 'SUBMIT ENDORSEMENT' button.

To enter Loss Payee / Sole Loss Payee details click the caret that is to the right of the “remove button”. This will expand the bar to show all of the Loss Payee details to be entered. Note you can also add Administrative Agent details as well if needed.

The screenshot shows the expanded form for entry #1. The 'Effective Date' is 'Feb 26 2026'. Entry #1 has a 'REMOVE' button with a caret icon. The details for entry #1 are: Loss Payee Type: Sole Loss Payee; Name: American Green Bank; Full Address (Country, State, City, State, ZIP): 6 Avenue of Two Rivers South, Rumson, NJ, USA; Manually enter the address: Address Line 1: 6; Address Line 2: Avenue of Two Rivers South; Town/City: Rumson; State: New Jersey; ZIP: 07790; Country: United States; EMail Address: info@agb.com. A question 'Do you want to add Administrative Agent details?' is asked, with 'Yes' and 'No' buttons. Below this, there are fields for Administrative Agent Name: Fidelity Law LLP; Full Address (Country, State, City, State, ZIP): 43 Main Street, Peabody, MA, USA; Manually enter the address: Address Line 1: 43; Address Line 2: Main Street; Town/City: Peabody.

## G. Remove Loss Payee or Sole Loss Payee

**REFERRAL – NO**

Click the Trash Can icon underneath “Actions” and click submit to remove any Loss Payee or Sole Loss Payees.

The screenshot shows the 'Remove Loss Payees or Sole Loss Payees' form. The left sidebar contains a menu with options: Add endorsements, Amend Mailing Address, Amend Named Insured, Manuscript Request, Amend Master Aggregate Limits, Policy Extension, Add Loss Payees or Sole Loss Payees, and Remove Loss Payees or Sole Loss Payees. The main form area has a title 'Remove Loss Payees or Sole Loss Payees' and an 'Effective Date' field set to 'Feb 28 2026'. Below this is a table with columns: Loss Payee Name, Address, Email, Effective From, Pending Removal, and Actions. One row is visible for 'American Green Bank' with address '6 Avenue of Two Rivers South, Rumson, NJ, USA', email 'Notices@AGB.com', effective date '02/25/2026', and pending removal status 'No'. The 'Actions' column for this row contains a trash can icon. At the bottom right, there is a 'SUBMIT ENDORSEMENT' button.

## H. Add Additional Insureds or Additional Named Insureds

**REFERRAL – NO**

This endorsement matches the functionality of F. Add Loss Payee or Sole Loss Payee. Refer to that section to see how to add an entity to the endorsement.

## I. Remove Additional Insureds or Additional Named Insureds

**REFERRAL – NO**

This endorsement matches the functionality of G. Remove Loss Payee or Sole Loss Payee. Refer to that section to see how to add an entity to the endorsement.

## J. Amend Master Name

**REFERRAL – NO**

If you would like to change the name of the program, this is where that change can be made.

The screenshot shows the 'Amend Master Name' form. The left sidebar is the same as in the previous screenshot. The main form area has a title 'Amend Master Name' and an 'Effective Date' field set to 'Feb 01 2026'. Below this is a 'Program Name' field with a dropdown menu showing 'Training Guide - Master Solar Program'. At the bottom right, there is a 'SUBMIT ENDORSEMENT' button.

## K. Amend Declaration

**REFERRAL – Depends on Limits / Deductibles Selected**

Click the edit pencil icon on the right hand side of the Declaration Page you would like to amend. It will then bring you to the same screen as outlined in Section 6. Creating the First Declaration Page or Section 10. Processing Endorsements L. Add New Declaration. If you want to add Terrorism to an existing Declaration or change the CAT sublimits / deductibles that would be done via this endorsement.

**Amend Declaration**

Effective Date: Feb 12 2026

Declaration N... | Project Name | Project City

Dec #	Declaration Name	TIV	NWS Attachment	EM Attachment	FL Attachment	SCS Attachment	VF Attachment	# of Projects	Actions
1	Main Declaration Page - Training Guide	\$14,791,801.00	2,500,000,000 % / 30 days	2,500,000,000 % / 30 days	2,500,000,000 % / 30 days	2,500,000,000 % / 30 days	2,500,000,000 % / 30 days	8	

## L. Add new Declaration

**REFERRAL** – Depends on Limits / Deductibles Selected

Use this Endorsement to add additional Declarations to a policy.

**Add New Declaration**

Effective Date: Feb 10 2026

Declaration Name: Battery Energy Storage Declaration

**Named Windstorm (NWS)**

Limit: US\$2,500,000.00	Deductible: 2.5 %	Waiting Period: 45 Days
-------------------------	-------------------	-------------------------

**Earth Movement (EM)**

Limit: US\$2,500,000.00	Deductible: 3.5 %	Waiting Period: 45 Days
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**Flood**

Limit: US\$2,500,000.00	Deductible: %	Waiting Period: Days
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**Severe Convective Storm (SCS)**

Limit: -----	Deductible: %	Waiting Period: Days
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## M. Remove Declaration

### REFERRAL – NO

To remove a declaration select the one you would like to delete by clicking the Trash Can icon beneath the “Actions” row. NOTE: all projects insured under a declaration that is removed will also be removed from the policy.

OVERVIEW DETAILS DECLARATIONS & PROJECTS DOCUMENTS **ENDORSEMENTS** ENDORSEMENT HISTORY ACTIVITIES

**Add endorsements**

- Amend Mailing Address
- Amend Named Insured
- Manuscript Request
- Amend Master Aggregate Limits
- Policy Extension
- Add Loss Payees or Sole Loss Payees
- Remove Loss Payees or Sole Loss Payees
- Add Additional Insureds
- Remove Additional Insured or Additional Named Insured
- Amend Master Name
- Amend Declaration
- Add new Declaration
- Remove Declaration**

**Remove Declaration**

Effective Date: Feb 18 2026

Declaration N... Project Name Project City

**Select Declaration**

Dec #	Declaration Name	TIV	NWS Attachment	EM Attachment	FL Attachment	SCS Attachment	VF Attachment	# of Projects	Actions
1	Main Declaration Page - Training Guide	\$14,791,801.00	2,500,000.00 % / 30 days	2,500,000.00 % / 30 days	2,500,000.00 % / 30 days	2,500,000.00 % / 30 days	2,500,000.00 % / 30 days	8	
2	Battery Energy Storage Declaration	\$0.00	2,500,000.00 % / 45 days	3,500,000.00 % / 45 days	2,500,000.00 % / 45 days	2,500,000.00 % / 30 days	2,500,000.00 % / 30 days	0	

Rows per page: 10 1-2 of 2

SUBMIT ENDORSEMENT

## N. Add Project(s)

### REFERRAL – Depends on a Project’s Location, Value, Asset Class, or Claims History

To add projects to the policy via endorsement (this could be a one off location or a quarterly adjustment) first select which Declaration the new Project(s) should be added to by clicking the Pencil icon beneath the “Actions” row.

OVERVIEW DETAILS DECLARATIONS & PROJECTS DOCUMENTS **ENDORSEMENTS** ENDORSEMENT HISTORY ACTIVITIES

**Add endorsements**

- Amend Mailing Address
- Amend Named Insured
- Manuscript Request
- Amend Master Aggregate Limits
- Policy Extension
- Add Loss Payees or Sole Loss Payees
- Remove Loss Payees or Sole Loss Payees
- Add Additional Insureds
- Remove Additional Insured or Additional Named Insured
- Amend Master Name
- Amend Declaration
- Add new Declaration
- Remove Declaration

**Add Project(s)**

Effective Date

Declaration N... Project Name Project City

**Select Declaration**

Dec #	Declaration Name	TIV	NWS Attachment	EM Attachment	FL Attachment	SCS Attachment	VF Attachment	# of Projects	Actions
1	Main Declaration Page - Training Guide	\$14,791,801.00	2,500,000.00 % / 30 days	2,500,000.00 % / 30 days	2,500,000.00 % / 30 days	2,500,000.00 % / 30 days	2,500,000.00 % / 30 days	8	
2	Battery Energy Storage Declaration	\$0.00	2,500,000.00 % / 45 days	3,500,000.00 % / 45 days	2,500,000.00 % / 45 days	2,500,000.00 % / 30 days	2,500,000.00 % / 30 days	0	

Rows per page: 10 1-2 of 2

SUBMIT ENDORSEMENT

You will then be given the option to either add a location Manually or Upload from an XLS excel file. See Section 7. Adding Projects to the Quote for more details.

**ENDORSEMENTS**

OVERVIEW | DETAILS | DECLARATIONS & PROJECTS | DOCUMENTS | **ENDORSEMENTS** | ENDORSEMENT HISTORY | ACTIVITIES

Add Project(s)

Effective Date

Main Declaration Page - Training Guide - Projects

Project Name Upload From XLS Add Project Manually Download Template

#	Project Name	Longitude & Latitude	City	State	Asset Type	TIV	AOP Attac
1	Watchung Solar	40.6441613 / -74.4158929	Watchung	NJ	Solar: Rooftop - Commercial	\$3,680,452.00	\$25,000.00
2	Sierra Processing Solar	42.6235616 / -73.7704062	Albany	NY	Solar: Rooftop - Commercial	\$948,605.00	\$25,000.00
3	Harbor Hotel Carport	42.0620117 / -70.1617859	Provincetown	MA	Solar: Rooftop - Carport	\$118,803.00	\$25,000.00
4	Harbor Hotel Rooftop	42.0620117 / -70.1617859	Provincetown	MA	Solar: Rooftop - Commercial	\$275,527.00	\$25,000.00
5	IndyGo West Campus	39.765522 / -86.188601	Indianapolis	IN	Solar: Rooftop - Commercial	\$1,316,048.00	\$25,000.00
6	Plastic Recycling Group	39.7621391 / -86.3011102	Indianapolis	IN	Solar: Ground mount - Fixed	\$4,203,011.00	\$50,000.00
7	City of Phoenix Aviation Department	33.4358196 / -112.0314493	Phoenix	AZ	Solar: Rooftop - Carport	\$3,368,910.00	\$25,000.00
8	Casa Loma Elementary School	35.338803 / -118.994633	Bakersfield	CA	Solar: Rooftop - Carport	\$880,445.00	\$25,000.00

Flows per page: 10 1-8 of 8

CANCEL SUBMIT ENDORSEMENT

## O. Remove Project(s)

### REFERRAL – NO

To remove a Project(s) from a Declaration Page and the Policy, first select which Declaration you would like to remove the project from by clicking on the Pencil icon underneath the “Actions” row.

**ENDORSEMENTS**

OVERVIEW | DETAILS | DECLARATIONS & PROJECTS | DOCUMENTS | **ENDORSEMENTS** | ENDORSEMENT HISTORY | ACTIVITIES

Remove Project

Effective Date Feb 11 2026

Declaration Na... Project Name Project City

Select Declaration

Dec #	Declaration Name	TIV	NWS Attachment	EM Attachment	FL Attachment	SCS Attachment	VF Attachment	# of Projects	Actions
1	Main Declaration Page - Training Guide	\$14,791,801.00	2.50000000 % / 30 days	2.50000000 % / 30 days	2.50000000 % / 30 days	2.50000000 % / 30 days	2.50000000 % / 30 days	8	
2	Battery Energy Storage Declaration	\$0.00	2.50000000 % / 45 days	3.50000000 % / 45 days	2.50000000 % / 45 days	2.50000000 % / 30 days	2.50000000 % / 30 days	0	

Rows per page: 10 1-2 of 2

SUBMIT ENDORSEMENT

You can then click the Trash Can icon for each project you would like to remove and then click submit endorsement.

The screenshot displays the 'Remove Project' interface. On the left is a sidebar with various actions like 'Add endorsements', 'Amend Mailing Address', etc. The main area shows a 'Main Declaration Page - Training Guide - Projects' with a search bar and a table of projects. The table has columns: #, Project Name, Longitude & Latitude, City, State, Asset Type, TIV, AOP Attachment, and Actions. The 'Actions' column contains trash can icons for each project. At the bottom right, there are 'CANCEL' and 'SUBMIT ENDORSEMENT' buttons.

#	Project Name	Longitude & Latitude	City	State	Asset Type	TIV	AOP Attachment	Actions
1	Watchung Solar	40.6441613 / -74.4158929	Watchung	NJ	Solar: Rooftop - Commercial	\$3,680,452.00	\$25,000.00 / 30 days	
2	Sierra Processing Solar	42.6235616 / -73.7704062	Albany	NY	Solar: Rooftop - Commercial	\$948,605.00	\$25,000.00 / 30 days	
3	Harbor Hotel Carport	42.0620117 / -70.1617859	Provincetown	MA	Solar: Rooftop - Carport	\$118,803.00	\$25,000.00 / 30 days	
4	Harbor Hotel Rooftop	42.0620117 / -70.1617859	Provincetown	MA	Solar: Rooftop - Commercial	\$275,527.00	\$25,000.00 / 30 days	
5	IndyGo West Campus	39.765522 / -86.188601	Indianapolis	IN	Solar: Rooftop - Commercial	\$1,316,048.00	\$25,000.00 / 30 days	
6	Plastic Recycling Group	39.7621391 / -86.3011102	Indianapolis	IN	Solar: Ground mount - Fixed	\$4,203,011.00	\$50,000.00 / 0 days	
7	City of Phoenix Aviation Department	33.4358196 / -112.0314493	Phoenix	AZ	Solar: Rooftop - Carport	\$3,368,910.00	\$25,000.00 / 30 days	
8	Casa Loma Elementary School	35.338803 / -118.994633	Bakersfield	CA	Solar: Rooftop - Carport	\$880,445.00	\$25,000.00 / 30 days	

## P. Amend Project(s)

**REFERRAL** – Depends on a Project’s Updated Value or Asset Class

See section O – Remove Project(s). Follow the same steps but instead of there being a Trash Can Icon there will be a Pencil icon under the Actions Row. If you click the pencil icon it will bring you to the same “Add Project Manually” screen used throughout the platform. Here you can edit any Project information with the exception of the Address or Lat / Long. If these need to be fixed you will need to remove the location and then add it as new.

## Q. Multiple Project Changes

**REFERRAL** – Depends on a Project’s Location, Value (New or Updated), Asset Class, or Claims History

If you need to make a number of changes to the Projects insured under the Policy, this endorsement can be used to make changes via an Excel SOV that can be downloaded, updated and then re-uploaded. This is best used when a change impacts more than a few Projects (e.g. a portfolio wide increase in Property Damage and / or Revenue values. You will first have to select which Declaration you would like to make a bulk Project adjustment to by clicking the Pencil Icon under the “Actions” row.

You can then select “Remove All” or “Edit All”. If you select “Remove All” it will ask you to confirm that you want to remove all of the Projects Insured under that Declaration Page

If you select “Edit All” you will then be able to download the Excel SOV document, make your changes, and then drop the file back into the box below (or upload from excel).

The screenshot shows a software interface with a top navigation bar containing tabs: OVERVIEW, DETAILS, DECLARATIONS & PROJECTS, DOCUMENTS, ENDORSEMENTS (highlighted), ENDORSEMENT HISTORY, and ACTIVITIES. On the left, a sidebar lists various actions: Add endorsements, Amend Mailing Address, Amend Named Insured, Manuscript Request, Amend Master Aggregate Limits, Policy Extension, Add Loss Payees or Sole Loss Payees, Remove Loss Payees or Sole Loss Payees, Add Additional Insureds, Remove Additional Insured or Additional Named Insured, Amend Master Name, and Amend Declaration. The main content area displays a 'Multiple Project Changes' dialog box with an 'Effective Date' of Mar 19 2026. Below this, a sub-dialog titled 'Main Declaration Page - Training Guide - Projects' contains the 'Edit all Project values' section. This section includes a 'DOWNLOAD PROJECTS LISTING' button, a list of instructions: '1. Download the projects listing Excel sheet', '2. Edit the file locally', and '3. Upload from Excel', and a dashed box with the text 'CLICK OR DROP FILE TO UPLOAD FROM EXCEL'. At the bottom right of the dialog are 'CANCEL' and 'SUBMIT ENDORSEMENT' buttons.

## 11. Tips and Tricks

### A. Transferring existing SOV into ARO format

While we have worked to keep the number of questions to a minimum, it still takes effort to convert an existing SOV into the ARO format. Here are a few tips when transferring his information over:

1. Copy text and paste into the ARO formatting using “Paste Special”. This is the caret icon beneath the Paste button. There are four options (Keep Source Formatting, Merge Formatting, Picture, and Keep Text Only). Pasting using the “Keep Text Only” option is the fastest way to copy text into the SOV without accidentally carrying over any prior formatting or formulas.
2. If a single location has two asset classes, enter them as two locations.
3. If you have multiple project locations with the same information (e.g. multiple roof-mount projects or several assets with a \$25k deductible, you can click / drag the entry down which can help cut down on repetitive entries. NOTE: Be careful doing this under the Claims question.

### B. Premium too High?

If the premium for adding a location is coming in too high, try adjusting your AOP PD Deductible or AOP Waiting Period. If the location is CAT-exposed, consider creating a new Declaration Page with a higher percentage CAT PD Deductible and CAT Waiting Period. You can revise your quotes and create multiple versions by clicking Modify Quote on the binding screen. To switch between versions, click the caret next to Revision: #.

The screenshot shows a web interface for a quote summary. At the top left, there is a link to "Return to dashboard". The main heading is "Master Quote Summary". Below this, the quote number "DE16670000023P" and insured name "Training Guide Renewables LLC" are displayed. A "Revision: #2" dropdown is next to a "Modify Quote" button, which is highlighted with a red box. To the right is a "NEW ACTIVITY +" button. Below these are navigation tabs: "OVERVIEW" (selected), "DETAILS", "DECLARATIONS & PROJECTS", "DOCUMENTS" (with a notification badge of 3), and "ACTIVITIES". The main content area is split into two columns. The left column shows "Training Guide - Master Program" with a checkmark icon and a large premium amount of "US\$36,908.00", with the text "Current total gross premium" below it. The right column shows "Quote" status, a calendar icon, and the dates "02/01/2026" (inception date) and "02/01/2027" (expiry date). At the bottom, there is a "BIND QUOTE" button, a confirmation checkbox with the text "I confirm that all information entered is correct to my knowledge and there are no known or reported circumstances that could lead to a claim.", and a "NET DOWN QUOTE" button.

### C. Why use multiple Declaration Pages?

Declaration pages add flexibility and customization options to the policies you are broking. From a coverage perspective you can tailor the CAT sublimits and deductibles, as well as add or remove Terrorism coverage. A few use cases for multiple declaration pages are outlined below:

1. If a few High Hazard locations are driving up the policy premium, you could create a separate “High Hazard” declaration page with higher CAT deductibles and add those higher risk locations. The higher CAT attachments will reduce the premium but the other low risk locations will retain the benefit of the lower deductibles on the original declarations page.
2. An insured might want to have their Solar and BESS locations split between different declarations pages.

### D. What if a project has multiple asset Classes?

If you have a project that has multiple asset classes installed (e.g. rooftop + outdoor BESS or rooftop + carport) enter it as two separate locations and divide the values between them.

### E. Need the most up to date excel SOV?

If you need an Excel file listing all projects currently insured under the platform, go to the Endorsements tab and select Multiple Project Changes (the last endorsement in the list). At this time, you’ll need to download a separate Excel file for each declaration. In the future, we plan to add functionality that will consolidate declarations into separate tabs within a single spreadsheet. To download the SOV for a specific declaration, click the pencil icon next to the Declaration Page you want, then select Edit All.

Manuscript Request

Amend Master Aggregate Limits

Policy Extension

Add Loss Payees or Sole Loss Payees

Remove Loss Payees or Sole Loss Payees

Add Additional Insureds

Remove Additional Insured or Additional Named Insured

Amend Master Name

Amend Declaration

Add new Declaration

Remove Declaration

Add Project(s)

Remove Project(s)

Amend Project(s)

Multiple Project Changes

#### Main Declaration Page - Training Guide - Projects

Remove All Edit All

#	Project Name	Longitude & Latitude	City	State	Asset Type	TIV	AOP Attachm
1	Watchung Solar	40.6441613 / -74.4158929	Watchung	NJ	Solar: Rooftop - Commercial	\$3,680,452.00	\$25,000 / 30 days
2	Sierra Processing Solar	42.6235616 / -73.7704062	Albany	NY	Solar: Rooftop - Commercial	\$948,605.00	\$25,000 / 30 days
3	Harbor Hotel Carport	42.0620117 / -70.1617859	Provincetown	MA	Solar: Rooftop - Carport	\$118,803.00	\$25,000 / 30 days
4	Harbor Hotel Rooftop	42.0620117 / -70.1617859	Provincetown	MA	Solar: Rooftop - Commercial	\$275,527.00	\$25,000 / 30 days
5	IndyGo West Campus	39.765522 / -86.188601	Indianapolis	IN	Solar: Rooftop - Commercial	\$1,316,048.00	\$25,000 / 30 days
6	Plastic Recycling Group	39.7621391 / -86.3011102	Indianapolis	IN	Solar: Ground mount - Fixed	\$4,203,011.00	\$50,000 / 0 days
7	City of Phoenix Aviation Department	33.4358196 / -112.0314493	Phoenix	AZ	Solar: Rooftop - Carport	\$3,368,910.00	\$25,000 / 30 days
8	Casa Loma Elementary School	35.338803 / -118.994633	Bakersfield	CA	Solar: Rooftop - Carport	\$880,445.00	\$25,000 / 30 days

Afterwards you will be taken to another screen where you can click “Download Projects Listing” and you will be prompted to save the excel file wherever you would like on your computer.

Multiple Project Changes

Effective Date

Main Declaration Page - Training Guide - Projects

Edit all Project values

1. Download the projects listing Excel sheet  
**DOWNLOAD PROJECTS LISTING**
2. Edit the file locally
3. Upload from Excel  
**CLICK OR DROP FILE TO UPLOAD FROM EXCEL**

## 12. Asset Class Descriptions

See below for a description of each asset class along with images to help identify which option should be selected. If there are any questions on what should be selected please feel free to reach out to [AROUnderwriting@aegislimited.com](mailto:AROUnderwriting@aegislimited.com).

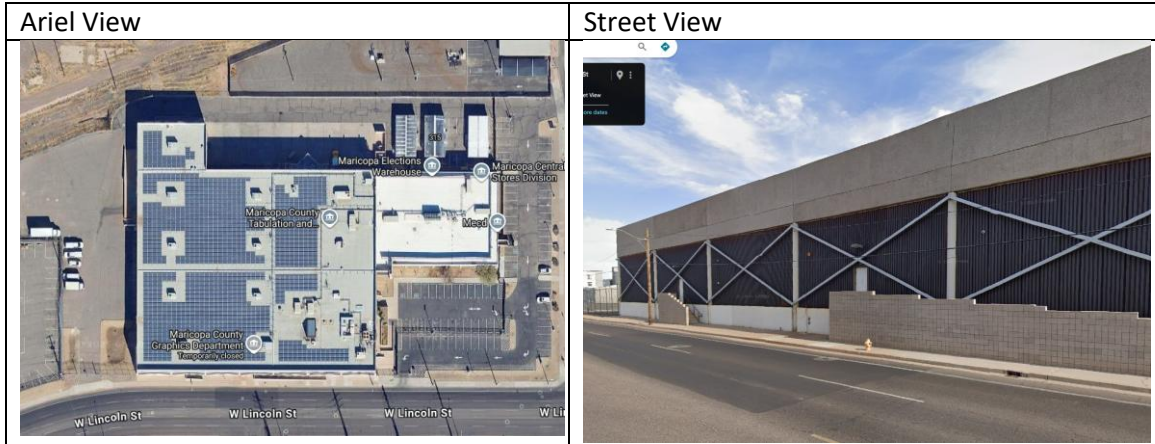
### A. Solar: Rooftop - Residential

This category should be used for a project where the solar panels are mounted the roof or other structure at a residential property. At launch this asset class will not be allowed to be selected but it will be added shortly after launch.



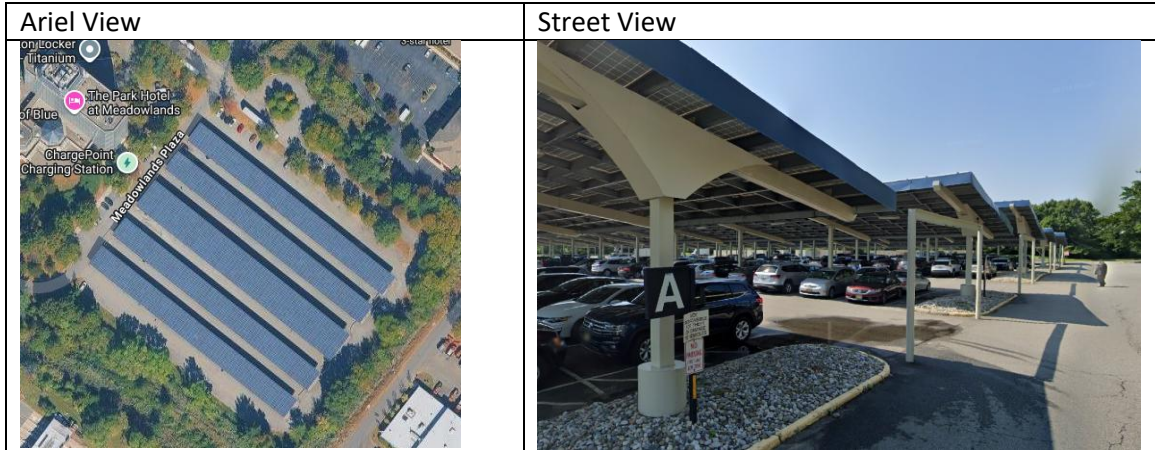
### B. Solar: Rooftop - Commercial

This category should be used for a project where the solar panels are mounted to the roof of a commercial or industrial building. Panels mounted to the roof of a School or nonprofit institution (e.g. a church) would also this selection.



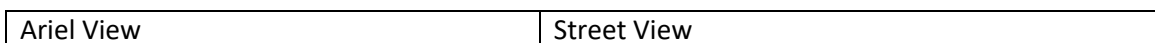
### C. Solar: Rooftop - Carport

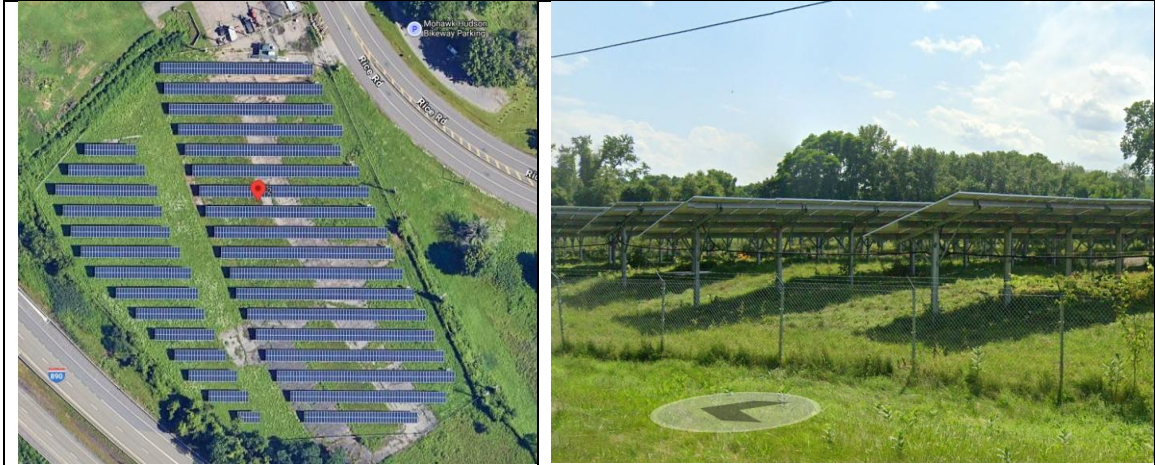
This category should be used for a project where the solar panels are mounted to an elevated parking structure. These installations are typically found in commercial / industrial settings, but can also be found in town or municipal parking areas as well.



### D. Solar: Ground Mount - Fixed

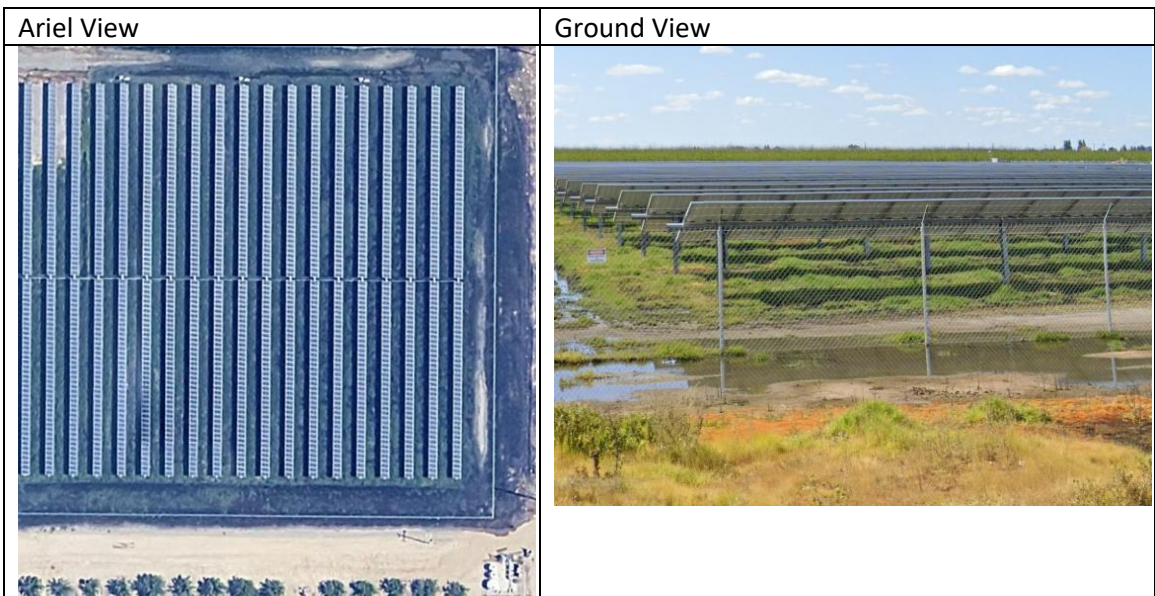
This category should be used for a project where the solar panels are mounted to a racking system that stays in a fixed position throughout the day. Unlike other Ground Mount installations that will track the sun throughout the day, these installations lack that capability. Note that fixed installations in any panel configuration (1 in portrait, 2 in portrait, 4 in portrait) would all still use this category (so long as they do not track the sun).





### E. Solar: Ground Mount – Single Axis Tracker (1P)

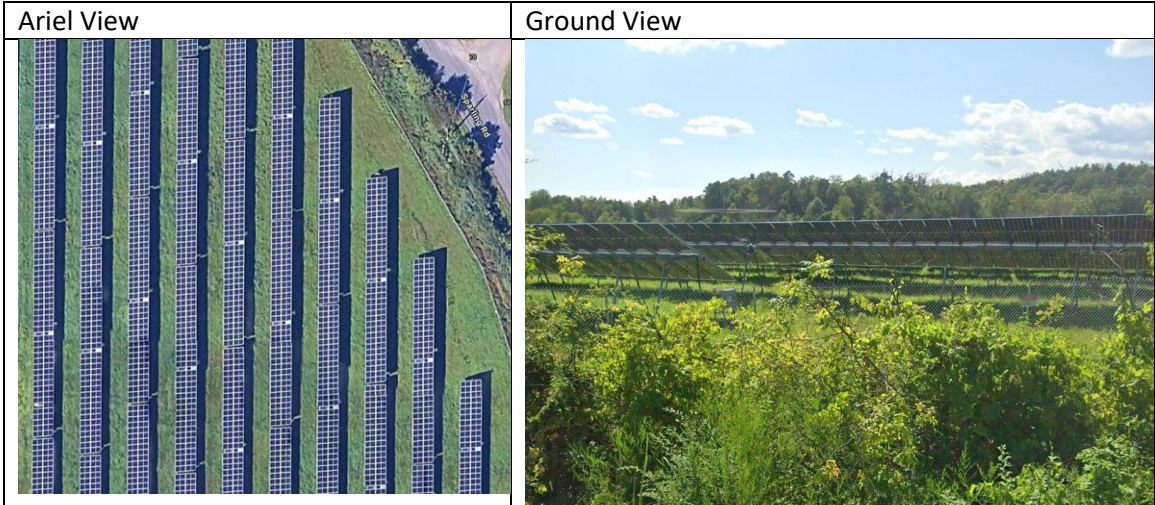
This category should be used for a project where the solar panels are mounted to a racking system that tracks the sun throughout the day in a single axis (typically from East to West). These systems are also able to enter various safety stow modes based on environmental conditions that (e.g. wind stow in high winds or hail stow during hail storms). With this configuration there is a single solar panel mounted on top of a torque tube. This 1P (1 in portrait) configuration is the most common tracking configuration.



### F. Solar: Ground Mount – Single Axis Tracker (2P)

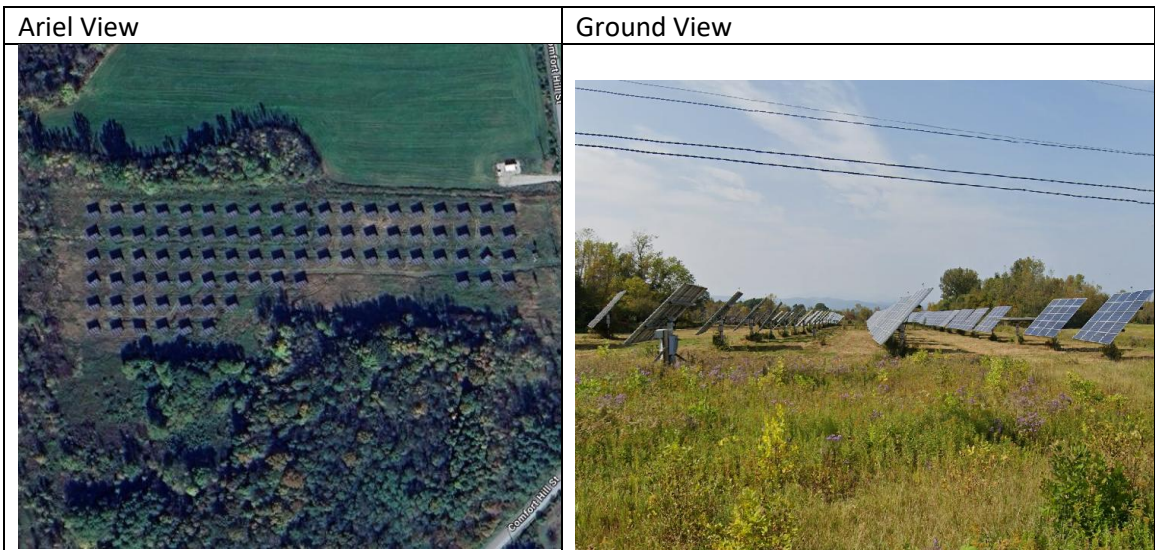
This category should be used for a project where the solar panels are mounted to a racking system that tracks the sun throughout the day in a single axis (typically from East to West). The primary difference between 1P and 2P tracker is that with a 2P (2 in portrait) system there is a solar panel that sits on either side of the torque tube. As you can see by the images below these are much larger configurations and the larger surface area the 2 panels create has typically resulted in a

higher frequency of wind damage claims. Given this increased frequency (and severity) of claims this solar configuration is excluded from coverage within this platform. Reach out to your AEGIS Renewable Energy Underwriter to review this risk separately. Note that if you have a 2P system and it does not have a tracking system you should select “Solar: Ground Mount – Fixed”.



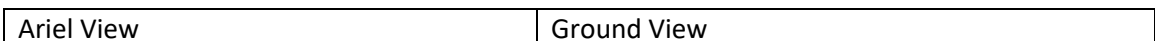
#### G. Solar: Ground Mount – Dual Axis Tracker

This category should be used for a project where the solar panels are mounted to a racking system that tracks the sun throughout the day in two axis'. This increases generation for projects located in higher latitudes.



#### H. BESS: Indoor

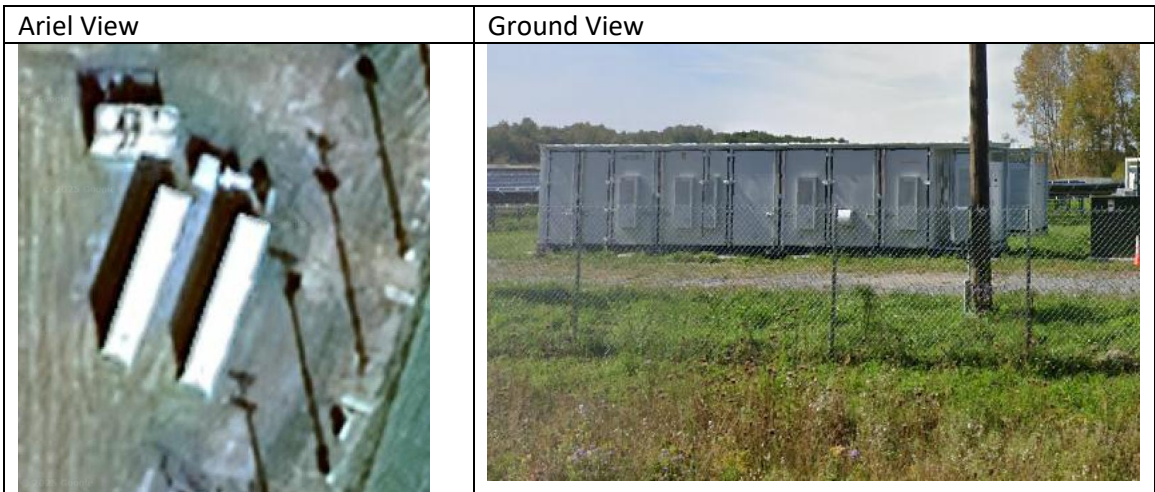
This category should be used for a project where a Battery Energy Storage System (BESS) is installed within a building or other enclosed space.





**I. BESS: Outdoor**

This category should be used for a project where a Battery Energy Storage System (BESS) is installed outdoors. These systems often times look like Shipping Containers or long / thin electrical cabinets. They can be co-located with Solar sites or standalone (if they are co-located, enter the location twice in the system, once as a solar project and another time as a BESS project, each reflecting the respective proportion of the total project values.



**13. Known Bugs / Issues**

As the platform is still in development, there are several known / documented bugs that are actively being worked on. See below for a list of these bugs and their status:

**A. Project TIV's not calculating on Declaration Page Summary until after binding**

The project TIV, despite being added to the declaration will show as \$0 prior to binding. This has been identified and is being worked on. It will likely be fixed post launch as it does not break the journey when binding an account.

## B. Out of sequence endorsements resulting in incorrect premiums

If you bind a premium bearing endorsement (e.g. a project addition) at a certain date (lets say 7/1/2025) and then process another premium bearing endorsement but backdate prior to the last transaction (lets say 6/30/2025) the premium is calculating incorrectly, often times by a fairly large margin. This is being worked on and will be fixed prior to launch. If you run into this issue reach out to [ARUnderwriting@aegislimited.com](mailto:ARUnderwriting@aegislimited.com).

## C. Address Auto-Fill

Sometimes the town will not auto-fill, you will have to click “manually enter” and type in the town

## D. Using Addresses instead of coordinates for project locations.

When you use an address for a project location and the street address and zip code from the SOV don't match, the location that is derived into lat / long coordinates might be incorrect.

When using the address field to add locations, please verify that the lat / long that is generated is accurate.