

Date: [Insert Date]

[Property Insurance Agency Name]

[Address]

[City, State, Zip]

[Roofing Contractor Company Name]

[Address]

[City, State, Zip]

Subject: B2B Referral Agreement

Dear [Name of Contact Person],

This letter serves as a formal agreement between [Property Insurance Agency Name] (the "Agency") and [Roofing Contractor Company Name] (the "Contractor") regarding a mutual business referral relationship.

1. Purpose

The parties agree to refer clients to one another to ensure property owners receive high-quality roofing services and comprehensive insurance coverage. This partnership is built on the shared goal of protecting the client's property and financial interests.

2. Referral Process

The Agency agrees to refer policyholders in need of roof inspections, repairs, or replacements to the Contractor. The Contractor agrees to refer property owners in need of insurance reviews or new policies to the Agency.

3. Responsibilities

- The Contractor agrees to provide professional, timely estimates and maintain all necessary licenses and insurance.
- The Agency agrees to provide expert consultation on policy coverage and claims processes.
- Both parties agree to act in the best interest of the referred client at all times.

4. Compensation (Optional)

[Insert details regarding referral fees if applicable, or state: "No monetary compensation shall be exchanged for referrals under this agreement; the benefit is the mutual growth of client bases."]

5. Term and Termination

This agreement begins on [Start Date] and will remain in effect until either party provides [Number] days' written notice of termination.

6. Confidentiality

Both parties agree to protect the personal and contact information of all referred clients in accordance with applicable privacy laws.

Please sign below to indicate your acceptance of these terms.

For [Property Insurance Agency Name]:

Signature: _____

Print Name/Title: _____

For [Roofing Contractor Company Name]:

Signature: _____

Print Name/Title: _____