



Agency/Broker Profile

Agency/BrokerName

Check One Corporation Partnership Limited Liability Sole Partnership

Tax ID Number License Number

Mailing Address

City State Zip Code Home Office Branch Office

PhysicalAddress

City State Zip Code

Phone Number Fax Number

Owner(s)/Manager Year Agency Established

Key Contact(s)

Key Contact Email Address Number of Employees

Agency Premium Volume Average Premium

Agency Financed Volume (Commercial)

Agency Management System

Current Finance Co(s)

Current Terms & Rates (Optional)

Company Appointments

MGA's or Brokers used

Specialty Programs

Agency Website Address

Comments: What can your current Finance Company do better?

Copy of Agency License and Copy of E&O Dec Page must be attached