



AGENCY INFORMATION PROFILE

LEGAL AGENCY NAME: _____

DBA NAME: _____

MAILING ADDRESS: _____

PHYSICAL ADDRESS: _____

PHONE: _____ FAX: _____ E-MAIL: _____

COUNTY: _____ FED TAX ID#: _____ SOC SEC #: _____

E & O CARRIER: _____ LIMITS: _____ EXP DATE: _____

YRS. IN BUSINESS _____ CAPTIVE AGENCY _____ INCORPORATED? Y N

AGENCY PRINCIPAL: _____ E-MAIL: _____

LICENSED AGENT: _____ E-MAIL: _____

LICENSE # OF AGENT: _____ EXPIRATION DATE: _____

PERSONAL LINES CONTACT: _____ E-MAIL: _____

COMMERCIAL CONTACT: _____ E-MAIL: _____

COMMERCIAL PHONE: _____

LIST NAMES & BIRTHDATES OF AGENT & COMMERCIAL CSR's (use back of page if necessary):

1) _____ 2) _____ 3) _____

TOTAL ANNUAL PREMIUM VOLUME \$ _____ % PERSONAL LINES: _____

% COMMERCIAL: _____ HOMEOWNER PREMIUM \$ _____ FLOOD PREMIUM: \$ _____

AGENCY MANAGEMENT SYSTEM: _____

LIST YOUR TOP 3 COMMERCIAL MARKETS:

2) _____ 2) _____ 3) _____

Signature of Principal

Date

(To be completed by company)

AGENCY CODE: _____ USER ID: _____ PASSWORD: _____

AGENT/COMPANY AFFILIATION _____ MARKETING REP _____