

### Agent/Broker Profile

Name of Agency: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Telephone #: \_\_\_\_\_ Fax #: \_\_\_\_\_ Website Address: \_\_\_\_\_

Owner/Principal Name(s): 1) \_\_\_\_\_ 2) \_\_\_\_\_

Agency Contact Name: \_\_\_\_\_ Title: \_\_\_\_\_ E-mail: \_\_\_\_\_

Accounting Contact Name: \_\_\_\_\_ E-mail: \_\_\_\_\_

Agency Preferred Funding Method:    WIRE     ACH     AGENCY DRAFTS     USPF CHECK

#### Agency Information

Agency License number: \_\_\_\_\_ Years in Business: \_\_\_\_\_

Est. Total Annual Premiums: \_\_\_\_\_ Est. Ave. Contract Size: \_\_\_\_\_

Est. Annual Finance Volume: \_\_\_\_\_ Number of Producers: \_\_\_\_\_

Number of Employees: \_\_\_\_\_ Special Programs: \_\_\_\_\_

#### E&O Coverage

Company/Policy Number/ Expiration date	Per Occurrence Limit	Amount Cumulative

Name of Principals/Licensed Producers	Individual License #	Signatures	% Ownership	CSR	Direct Phone #
1)					
2)					
3)					
4)					
5)					

*When an agent or it's representative(s) (CSR, AE, etc.) prepares a premium finance quote, the agent agrees to select the appropriate cancellation terms, i.e. Minimum Earned, Short Rate, PUC/Filings etc. according to the policy language.*

#### -----FOR COMPANY USE ONLY-----

Approval Date: \_\_\_\_\_ Next File Review Date: \_\_\_\_\_ Agent Rating: \_\_\_\_\_

Start at: \_\_\_\_\_ Approved Funding Method: \_\_\_\_\_

Comments: \_\_\_\_\_

#### Approvals:

\_\_\_\_\_  
 Business Development Officer                      Date                                      President                                      Date

\_\_\_\_\_  
 Account Executive                                      Date

***Cont. Principals/Licensed Producers section***

Name of Principals/Licensed Producers	Individual License #	Signatures	% Ownership	CSR	Direct Phone #
6)					
7)					
8)					
10)					
11)					
12)					
13)					
14)					
15)					
16)					
17)					
18)					
19)					
20)					
21)					
22)					
23)					
24)					
25)					