



600 South Church Street  
 Ripley, WV 25271  
 304-372-1138

INSURANCE SERVICE, INC.

DATE: \_\_\_\_\_  
 FAX: \_\_\_\_\_

NAME OF AGENCY				AGENCY TELEPHONE NUMBER	
STREET ADDRESS				PRINCIPAL	
MAILING ADDRESS					
CITY	STATE	ZIP CODE	COUNTY	TAXPAYER NUMBER	

1. **AGENCY BACKGROUND**  
 A. When was present ownership of Agency established?  
 B. If present ownership or structure was established within the last five years, list previous entities:

PREVIOUS ENTITIES	YR. ACQUIRED	ESTIMATED VOLUME	MERGER or PURCHASE

2. **AGENCY PERSONNEL**

PRINCIPALS, KEY PERSONNEL, PLACERS	YEAR OF BIRTH	TITLE or POSITION	YEAR STARTED	
			IN INSURANCE BUSINESS	THIS AGENCY

3. **AGENCY COMPANIES**

1. Number of companies in agency. \_\_\_\_\_
2. Companies discontinued by agent last 3 years.

- A. \_\_\_\_\_ REASON \_\_\_\_\_
- B. \_\_\_\_\_ REASON \_\_\_\_\_
- C. \_\_\_\_\_ REASON \_\_\_\_\_

3. Companies who have canceled or suspended agent last 3 years.

- A. \_\_\_\_\_ REASON \_\_\_\_\_
- B. \_\_\_\_\_ REASON \_\_\_\_\_



6. OTHER AGENCY BUSINESSES:

- A. LIFE INSURANCE \_\_\_\_\_
- B. REAL ESTATE \_\_\_\_\_
- C. TAXES \_\_\_\_\_
- D. OTHER \_\_\_\_\_

ARE YOU A MANAGING AGENT FOR ANY COMPANY?  YES  NO

7. DOES PRODUCER ACCEPT BROKERED BUSINESS?  YES  NO

8. AGENCY SERVICES:

- A. CLAIM DRAFT AUTHORITY:  YES  NO COMPANY \_\_\_\_\_ AMOUNT \_\_\_\_\_
- B. COMPANY TERMINAL:  YES  NO COMPANY \_\_\_\_\_

8. - 1 E & O INSURANCE  
(ATTACH DEC SHEET)

CARRIER NAME: \_\_\_\_\_

COVERAGE AMT: \_\_\_\_\_

DEDUCTIBLE: \_\_\_\_\_

POLICY PERIOD: \_\_\_\_\_ TO \_\_\_\_\_

9. PROFIT SHARING AGREEMENTS:

- A. COMPANY \_\_\_\_\_ MINIMUM VOLUME \_\_\_\_\_
- B. COMPANY \_\_\_\_\_ MINIMUM VOLUME \_\_\_\_\_
- C. COMPANY \_\_\_\_\_ MINIMUM VOLUME \_\_\_\_\_

10. COMPUTER INFO:

DISK SIZE: \_\_\_\_\_

COMPUTER TYPE: \_\_\_\_\_ # OF STAND ALONES \_\_\_\_\_

MEMORY 384K 512K 640K MONITOR: MONO CGA EGA VGA

DOS VER: 3.0 3.1 3.2 3.3 4.0 5.0 5.1 5.2 PcDOS MSDOS OTHER FLOPPY DRIVE 5.25 3.5

HARD DRIVE LETTER: \_\_\_\_\_ TOTAL MEGS \_\_\_\_\_ AVAILABLE MEGS \_\_\_\_\_

MODEM MAKE/MODEL: \_\_\_\_\_ BAUD RATE: 1200 4800 9600

PRINTER MAKE/MODEL: \_\_\_\_\_ PARALLEL SERIAL

10. COMMENTS

SIGNED \_\_\_\_\_

ATTACHMENTS:

1. COMPANY EXPERIENCE REPORTS (LAST 3 YEARS)
2. AGENCY BUSINESS PLAN