



600 South Church St
 Ripley, WV 25271
 Phone: (304)372-1138
 Fax: (304)372-1430

DATE: _____

FAX: _____

EMAIL: _____

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 Business

- A. LIFE INSURANCE _____ ARE YOU A MANAGING AGENT FOR ANY COMPANY YES NO
- B. REAL ESTATE _____
- C. TAXES _____
- D. OTHER _____

Are you a Managing Agent for Any Company YES NO

Does Producer Accept Broker Business YES NO

7. Agency Services

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

8. 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. Comments

Empty rectangular box for comments.

SIGNED _____

ATTACHMENTS:

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