

# Agency Profile

**Federal ID#** \_\_\_\_\_

**Agency Name:** \_\_\_\_\_

**Street Address:** \_\_\_\_\_

**City:** \_\_\_\_\_ **County:** \_\_\_\_\_ **State:** \_\_\_\_\_ **Zip:** \_\_\_\_\_

**Phone:** (\_\_\_\_) \_\_\_\_\_ **Fax:** (\_\_\_\_) \_\_\_\_\_ **Agency Lic#** \_\_\_\_\_

**Agency Web Site Address** \_\_\_\_\_ **Other States Licensed in:** \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_

**Multiple Location Agency?** \_\_\_\_\_

**Satellite Address:** \_\_\_\_\_ **City/State:** \_\_\_\_\_ **Zip:** \_\_\_\_\_

**Agency Marketing Contact**

**Name** \_\_\_\_\_ **Title:** \_\_\_\_\_ **E-Mail Address** \_\_\_\_\_

**Top Three Commercial Insurance Markets**

**Top Three WC Markets**

**Estimated WC Volume**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Percentage of Agency Volume**  
\_\_\_\_\_ %

**Agency Owners & Managers**

**Name:** \_\_\_\_\_

**Name:** \_\_\_\_\_

**Title:** \_\_\_\_\_

**Title:** \_\_\_\_\_

**SS#** \_\_\_\_\_ **Lic#:** \_\_\_\_\_

**SS#:** \_\_\_\_\_ **Lic#** \_\_\_\_\_

**Name:** \_\_\_\_\_

**Name:** \_\_\_\_\_

**Title:** \_\_\_\_\_

**Title:** \_\_\_\_\_

**SS#** \_\_\_\_\_ **Lic#:** \_\_\_\_\_

**SS#:** \_\_\_\_\_ **Lic#** \_\_\_\_\_

**Agency Producers**

(1) **Name:** \_\_\_\_\_ **SS#** \_\_\_\_\_ **License#** \_\_\_\_\_ **E-Mail Address:** \_\_\_\_\_

(2) **Name:** \_\_\_\_\_ **SS#** \_\_\_\_\_ **License#** \_\_\_\_\_ **E-Mail Address:** \_\_\_\_\_

(3) **Name:** \_\_\_\_\_ **SS#** \_\_\_\_\_ **License#** \_\_\_\_\_ **E-Mail Address:** \_\_\_\_\_

(4) **Name:** \_\_\_\_\_ **SS#** \_\_\_\_\_ **License#** \_\_\_\_\_ **E-Mail Address:** \_\_\_\_\_

(5) **Name:** \_\_\_\_\_ **SS#** \_\_\_\_\_ **License#** \_\_\_\_\_ **E-Mail Address:** \_\_\_\_\_

**Commercial CSRs**

(Beside each, note number for corresponding producer or note portion of alphabet responsible for, in parenthesis)

**Name** \_\_\_\_\_ (\_\_\_\_) **E-Mail** \_\_\_\_\_ **Name** \_\_\_\_\_ (\_\_\_\_) **E-Mail** \_\_\_\_\_

**Name** \_\_\_\_\_ (\_\_\_\_) **E-Mail** \_\_\_\_\_ **Name** \_\_\_\_\_ (\_\_\_\_) **E-Mail** \_\_\_\_\_

**Name** \_\_\_\_\_ (\_\_\_\_) **E-Mail** \_\_\_\_\_ **Name** \_\_\_\_\_ (\_\_\_\_) **E-Mail** \_\_\_\_\_

**Name** \_\_\_\_\_ (\_\_\_\_) **E-Mail** \_\_\_\_\_ **Name** \_\_\_\_\_ (\_\_\_\_) **E-Mail** \_\_\_\_\_

**Interface Automation Information**

**Interfaced Carriers:** \_\_\_\_\_ **Computer Hardware:** \_\_\_\_\_

**Software:** \_\_\_\_\_ **Special Programs:** \_\_\_\_\_