

**AGENCY / BROKER Update and Prospect Form**

1. Agency Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Fed. I.D. #\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_City\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_State\_\_\_\_\_\_\_Zip\_\_\_\_\_\_\_\_

Business phone/area code \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Fax \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Website: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

2. Type of enterprise Individual Partnership Corporation Other

3. Bank reference\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

4. List key agency personnel for personal lines-Property/Casualty

**NAME\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**  Title\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ SS#\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Agent License #\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Yrs. of experience\_\_\_\_\_\_ Lines: Personal Commercial  Auto (all)

Email Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**NAME\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**  Title\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ SS#\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Agent License #\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Yrs. of experience\_\_\_\_\_\_ Lines: Personal Commercial  Auto (all)

Email Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**NAME\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**  Title\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ SS#\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Agent License #\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Yrs. of experience\_\_\_\_\_\_ Lines: Personal Commercial  Auto (all)

Email Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**NAME\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**  Title\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ SS#\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Agent License #\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Yrs. of experience\_\_\_\_\_\_ Lines: Personal Commercial  Auto (all)

Email Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

5. What Inland/Safe/AIS information and materials do you have? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Who is your primary contact person for us?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

6. Is your agency familiar with any of the following Safe products and underwriting philosophy? yes no

If assistance is needed on any of the product lines shown, please check the box.

Mobile Home  Dwelling Fire  (*owner* *; tenant* *; vacant* *)*

SPHO-8  Commercial Fire

*;*

Do your agents understand Actual Cash Value coverage as opposed to Replacement Value coverage, and how to

estimate approximate ACV of property? yes no

7. How did your agency hear about Safe?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

8. What Company(s) if any, will Safe replace or supplement?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

9. Does your agency accept brokerage from others, or countersign for others? yes no

10. Have any agents in your office ever been subject to disciplinary action by an insurance regulator?  yes no

**11. Who is your E & O carrier\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** *(attach a copy of current E & O Declarations Page*)

**Any E & O losses in the last 5 years?** **yes\*** **no (\*if yes, attach written explanation)**

12. What is your agency’s total estimate annual premium volume (excluding life, A&H and disability)? $\_\_\_\_\_\_\_\_\_\_\_\_

With personal lines being \_\_\_\_\_\_\_\_\_\_\_% of total volume.

13. List major companies in the agency, length of time represented, approximate written premium volume, incurred losses or loss ratio or if appropriate, mention any comments regarding shock or natural catastrophe caused losses:

Premiums & Losses 20\_\_\_\_ Premiums & Losses 20\_\_\_ Premiums & Losses 20\_\_\_

Losses $ Losses $ Losses $

Company Date Appt. W/P ER/P or Ratio W/P ER/P or Ratio W/P ER/P or Ratio

14. What % of your new personal line business is – Walk in \_\_\_\_\_\_% Call in \_\_\_\_\_\_% Agency solicitation \_\_\_\_\_\_%

15. Do you normally inspect property structures prior to writing or suggesting property value yes no or...

use customer photo or customer’s value concept? yes no

16. Is agent/broker familiar with the Safe agency contingent commission program? yes no.

17. Is agent/broker familiar with Inland/Safe or AIS binding procedures and limitations? yes no

18. List professional organization involvements \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Signature of agency principal Date