

EMPIRE SPECTRUM  
New Appointment Questionnaire

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

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

City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP: \_\_\_\_\_

Mailing Address (If different from above): \_\_\_\_\_

Phone: \_\_\_\_\_ FAX: \_\_\_\_\_

Primary Agency Contact Name & Title: \_\_\_\_\_

Phone ( if Different): \_\_\_\_\_ Email Address: \_\_\_\_\_

Cell: \_\_\_\_\_

Area of Operation: \_\_\_\_\_

Entity Type:  Corporation  Partnership  LLC  Individual

Principals/Officers/Partners: List all changes in last 3 years

Name	Title	Email Address

Has anyone been disciplined by the Insurance Department? \_\_\_\_\_

Do you broker business for other agents: \_\_\_\_\_

How Much and with who: \_\_\_\_\_

Total Agency Volume: \$ \_\_\_\_\_ Personal \_\_\_\_\_ Commercial \_\_\_\_\_

List any Companies added in last 5 years:

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List any Companies dropped in last 5 years and why:

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What is your current year to date Agency Total Written Premium, Loss Ratio and Retention Ratio from your 4 leading carriers?

Company	Year Appointed	Total Written Premium	Loss Ratio	Premium Retention %
		\$	%	%
		\$	%	%
		\$	%	%
		\$	%	%

Please provide 5 years hard copy agency experience for any common carriers?

Do you presently have policies written through any of our appointed agents? If so, please list the agency and premium volume below

Agency	Premium Volume:
	\$
	%

How many active producers does your agency have involved in writing new business? \_\_\_\_\_

Please describe in detail how your agency generates new personal and commercial business:

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Please list any special classes of business your agency specializes in:

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What are the top 3 classes of business your agency writes?

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How much in Personal new business premium did your agency write last year?

\$\_\_\_\_\_ Increase in PIF: \_\_\_\_\_

How much Commercial new business premium did your agency write last year?

\$\_\_\_\_\_ Increase in PIF: \_\_\_\_\_

Does your agency have a separate small commercial unit that focuses mainly on small commercial business?  Yes  No

Does your agency utilizes any carrier service centers, please list:

Company:	Number of Years	Premium Volume

Please list your agency's five largest accounts below:

Line of Business		Current Insurer	Annual Premium

Name of Agency Management System: \_\_\_\_\_

Version: \_\_\_\_\_

Does Your agency download commercial lines policy info from any of your carriers?  Yes  No

If your agency does download commercial lines policy info, please list details below:

Company	LOB(s) Being Downloaded

Please explain any shock losses or frequent problems:

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What Personal and Commercial Lines new business premium volume can you commit to Empire Spectrum over the next three years, excluding Agent of Record activity?

Line of Business	1 <sup>st</sup> year	2 <sup>nd</sup> Year	3 <sup>rd</sup> Year
Personal			
Commercial			
Other			

Does your agency have a written perpetuation plan? Please attach a copy

Please describe what your agency brings to Empire Spectrum:

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X \_\_\_\_\_

Signature of Agency Principal

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Date