



# AGENCY PROFILE

## CONTACT US:

Address:  
200 Unity Circle North Ste. E  
Lee's Summit, MO. 64086

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844.292.9090

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816.246.2659

Email:  
peoplespf@pebo.com

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## Agency Name

Business address

City

State

Zip Code

If business address is P.O. Box, list street address

Additional agency locations

Business Phone

Fax

Email

Tax ID #

License #

Contact Person/Title

Current Owner(s) years in business

Year Agency Est.

Ownership (include all Owners, Officers and Partners)

Name

Title

% of Ownership

Name

Title

% of Ownership

Name

Title

% of Ownership

## References (including Direct Carriers)

Full Name of Company/General Agent

Contact Name

Phone #

Email

Full Name of Company/General Agent

Contact Name

Phone #

Email

Full Name of Company/General Agent

Contact Name

Phone #

Email

Operations

Total P&C Volume

% is Commercial

Annual Premium Financed Vol.

Average size Acct

Type of Coverage Financed

Current Premium Finance Vendor

Current Memberships (IIA, PIA, other)

Is Your Agency Part of a Cluster Group

Yes

No

If yes, name

Agency Management System Currently Using

What is Your Funding Preference:

Total Number of Employees

What brings you to Peoples Premium Finance

## Authorized Signature

Date

Title