

AGENCY PROFILE

CONTACT US:

Address:
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Phone:
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Email:
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Web:
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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

