

Application for Membership

Instructions:

Please complete the following application to the best of your ability.

You may print a hard copy of this questionnaire and complete it by hand or if you have Adobe® Acrobat® (please note: Adobe® Reader® will not allow you to save your data input), you may complete the form on your computer by typing directly into the form fields. If you complete it on your computer, save this file first to a folder on your computer and then open it from that location before beginning to enter data.

When the application is complete, please fax it to 719/485-3895. If you wish to email it, please be aware that email is NOT a secure method of transmittal and if you email it, you do so at your own risk. Also, please maintain a copy for your records.

If you have any questions concerning this application, please contact me.

Thank You!

Chris Burand
The Agency Forum
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Pueblo, CO 81003

Phone: 719/485-3868
Fax: 719/485-3895

info@theagencyforum.net
www.theagencyforum.net

Much of the requested information is private. We understand and acknowledge that the information provided is confidential. We will treat it in that manner, and will under NO circumstances release it to another entity without your direction.

Contact Information

Name:

Date:

Agency Name:

Physical Address:

City, State, Zip:

Mailing Address:

City, State, Zip:

Phone:

Fax:

E-Mail Address:

Web Site:

Agency Profile

1. Total written premium:
2. Approximate premium volume: % Commercial Lines % Benefits
 % Personal Lines % Life
3. Total revenue:
4. Number of employees: (Full-time = 1; Part-time = 0.5)
5. Number of producers:
6. Number of agency principals:
7. Number of locations:

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8. Automation System: Version:
9. Type of organization: Sole Proprietorship Corporation
Partnership S Corp
LLC

10. List any insurance company advisory committees on which you serve:

11. List any companies with which the agency has "Preferred Status":

12. Number of P&C companies represented:

Number of Life companies represented:

Number of Benefits companies represented:

Number of E&S Brokers and MGA's used:

13. Five largest P&C markets by premium volume:

| | COMPANY | PREMIUM |
|----|---------|---------|
| 1. | | |
| 2. | | |
| 3. | | |
| 4. | | |
| 5. | | |

Total:

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14. Do any producers have ownership interest? Yes No N/A

If yes, does the agency have a producer contract including a buy/sell agreement?

Yes No

15. Does the agency have, with all producers, a: Covenant Not to Compete
Nonpiracy Agreement
Trade Secret Agreement

16. Does the agency have, with all staff, a: Covenant Not to Compete
Nonpiracy Agreement
Trade Secret Agreement

17. Benefits program (check all that apply): Pofit sharing Medical Plan
Pension plan ESOT/ESOP

18. Total producer compensation last year:

Total producer production last year:

Compensation to Production Ratio: %

19. Producer(s) are paid: Commission: % Renewal % New

Salary

Salary + Commission: % Renewal % New

Other:

If producers are paid using different methods, please note the differences:

Competitive Position

20. Agency's competitive advantages:

21. Agency's strengths:

22. Agency's weaknesses:

23. If the agency has target or niche markets, please list: