



## MASTER AGENCY PROFILE AND SUB-AGENT ADDENDUM

Below includes this addendum for the principal location and any sub-agent that will apply under the Agency Agreement. Make copies as needed.

Corporate Name: \_\_\_\_\_

DBA/Agency Name: \_\_\_\_\_

Street Address: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

City, State, Zip Code: \_\_\_\_\_

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

Phone: (\_\_\_\_\_) \_\_\_\_\_ Fax: (\_\_\_\_\_) \_\_\_\_\_

Web Site: \_\_\_\_\_

Tax ID Number: \_\_\_\_\_

National Producer Number: \_\_\_\_\_

Date Agency or Location Established: \_\_\_\_\_

List any additional Agents or CSR's at this location that may require an appointment\*

Name	Home Address	Email Address	License#	National Producer#

**\*FL & LA agencies** may have one appointment paid by company; any additional appointments will be reimbursed by agency. FL appointment fees \$62.10 per appointment, LA \$22.50 per appointment.

**\*SC agencies** are limited to one appointment per office location, additional appointments must be approved by management.

**\*MS agencies** - each agent will be subject to a background check & will need to reimburse \$25.00 per appointment.



## Agency Appointment Application

### Section One: Ownership

Within the last 5 years, has there been any of the following? If “yes”, please describe below.

	Yes/No	If yes, please explain
<b>Change in agency name?</b>		
<b>Change in ownership?</b>		
<b>Merger with or purchase of another agency?</b>		

### Section Two: Key Personnel

Please list the key agency personnel, including principal agents, owners, officers, and managers (other than personnel listed on profiles).

Name	Position/Title	Years of Experience

### Section Three: Number of licenses held within the agency

P&C: \_\_\_\_\_

E&S: \_\_\_\_\_

CSR: \_\_\_\_\_

Section Four: Miscellaneous

	Yes/No	If yes, please explain
Is agency a captive agency or partly captive?		
Is agency part of a cluster or network?		
Is the agency part of a franchise group?		
Has any key personnel in the agency ever been subject to an investigation or disciplinary action by any insurance authority?		
Does the agency have any revenue sources that are not insurance related?		
Has there ever been a claim, or a declination, non-renewal or cancellation related to the agency's E&O coverage?		

Does the agency belong to any insurance related associations?

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## Section Five: Agency Production

List the five (5) largest insurance carriers in order of volume.

Carrier	Premium	Commission %	Date Appointed

List any carriers that have terminated their contract with the agency in the last two years and the reason for the termination.

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Percentage breakdown of agency business

	%		%
<b>Line of business</b>		<b>Life/Health/Investments</b>	
<b>Personal Property</b>		<b>Other</b>	
<b>Personal Auto</b>		<b>Percentage of Total Book</b>	
<b>Commercial</b>			

What was the source of this prospect?

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What is the average number of HO/DP policies written each month?

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Was an annual volume commitment discussed? If so, what amount will the agency commit to writing with PMA's carriers?

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Is there a rollover opportunity?

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From which company?

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How many policies?

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Additional comments or notes:

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