
Section Four: Miscellaneous

	Yes or No
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?	

Explain any "yes" answers:

Does the agency belong to any insurance related associations?

Section Five: Agency Production

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

Carrier	Premium	Commission%	Date Appointed
1.			
2.			
3.			
4.			
5.			

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

Percentage breakdown of agency business

Line of business	Percentage of total book (%)
_____	_____
Personal Property	

Personal Auto	

Commercial	

Life/Health/Investments	

Other	

What was the source of this prospect?

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

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

Is there a rollover opportunity?

From which company?

How many policies?

Additional comments or notes: