



**COMMON
★ SENSE ★
MARKETS**

AGENCY PROFILE FORM

Please fill out the information below and return to:

Fax: (979) 776-4787

E-mail: service@anco.com

Common Sense Markets, P.O. Box 4870, Bryan, TX 77805

★ AGENCY INFORMATION

Agency Name _____
Contact _____
Mailing Address _____
City _____ **ST** _____ **Zip** _____
County _____ **Telephone** _____
Fax _____ **Website address** _____
E-mail address _____
Tax ID _____ **Agency License #** _____
E&O Insurance Carrier _____ **E&O Limit** _____

★ AGENCY LOCATION

Main Location (City/State): _____ **Satellite Offices (City/State):** _____
Agency location: Single Residence Apartment Townhome Condo
 Strip Mall Multi-Unit Office Single Occupancy Commercial Building

★ OWNERSHIP

Type of Ownership: Sole Proprietorship Partnership Corporation LLC

Name(s) of Owners	Title	Years of Experience	
		PL	CL

Years CL Experience within Agency: _____

Year Agency Established: _____ **Number of years under current Ownership:** _____

Number of people in these Positions: _____ **Producers/Solicitors** _____ **CSR's** _____ **Other** _____

Check all Designations held within agency: CPCU CIC AAI CLU ACSR CISR

Does the agency have ownership in another agency? No Yes - Please provide name: _____

Does the agency have ownership in a captive? No Yes - Please provide name: _____

Is the agency a member of an aggregator, cluster, alliance, etc? No Yes - Please provide name: _____

Automation System(s) used: _____

Agency is automated for the following function: Bookkeeping/Rating/Management Bookkeeping Rating Only

★ **CARRIERS & PRODUCTION**

Check carriers you have or have had in the past:

- Chubb The Hartford MetLife Mid-Continent
 Republic Safeco Travelers
 Other(s) _____

Approximately what percentage is Surplus Lines? _____ Commercial _____ Personal

Which Carrier(s) is/are most competitive? _____

Why are you looking for a new Carrier/Broker? _____

What New Business commitment can you make? 1st Year: _____ PIF _____ PL _____ CL

2nd Year: _____ PIF _____ PL _____ CL 3rd Year: _____ PIF _____ PL _____ CL

Top 3 Personal Lines Carriers:

	Written Premium	PIF
1.		
2.		
3.		

Top 3 Commercial Lines Carriers:

	Written Premium	PIF
1.		
2.		
3.		

Total Agency Volume: _____

Percentage of Volume is: _____ CL _____ PL _____ Life/Health

★ **SALES & MARKETING**

Check the following that apply to your Agency:

- Use Lead Generation program Use Telemarketer Have Effective Cross-sell program
 Have Re-solicitation program Focused on Niche programs Actively Up-sell customers
 Motivated by Contests/Incentives Sell Small Group P&C Partner with Purchasing Groups

★ **ADDITIONAL INFORMATION**

What interests you about Common Sense Markets? _____

How did you hear about Common Sense Markets? Referral Internet Competitor Client Other