

Worldwide Facilities Agency Information

Date Completed: ____/____/____

Producer's Name _____

Basic Information

Agency Name: _____

Address: _____

Street Address _____ *Suite/Floor* _____

City _____ *State* _____ *ZIP Code* _____

Telephone: () _____ FEIN #: _____

Fax: () _____ Years in Business: _____

Website: _____

Contact Information

Principle Contact: _____ Email: _____

Accounting Contact: _____ Email: _____

Marketing Contact: _____ Email: _____

New Business Contact: _____ Email: _____

Account Renewal Contact: _____ Email: _____

P/C Premium _____

E & S Premium _____

Additional Information

Name of Producers	Experience	Specialty
1 _____	_____	_____
2 _____	_____	_____
3 _____	_____	_____
4 _____	_____	_____
5 _____	_____	_____

Top 5 E & S Accounts	Premium	Class of Business
1 _____	_____	_____
2 _____	_____	_____
3 _____	_____	_____
4 _____	_____	_____
5 _____	_____	_____

Top 5 Wholesalers	Premium Volume	Preferred Market Used
1 _____	_____	_____
2 _____	_____	_____
3 _____	_____	_____
4 _____	_____	_____
5 _____	_____	_____

Agency Affiliations: _____

State(s) your Agency can file taxes in: _____

State(s) your Agency holds a Surplus Lines license in: _____

Areas that the Agency specializes in: _____

Areas of growth targeted by Agent: _____

What do you expect from a Wholesaler? _____

Additional needs/questions? _____

AGENT INFORMATION

PERSONAL:

Relationship Name: _____

Company Name: _____

Home Address: _____

Hometown: _____

Mobile Phone: _____

Married / Single / Divorced / Remarried: _____

Spouse / Partner Name: _____

Children's Names and Birth Dates: _____

Wedding Anniversary: _____

Children's Interests: _____

Family Activities: _____

College / Year / Degree

BUSINESS:

Skilled Trade: _____

Previous Employers / Situations: _____

Status Symbol in Office: _____

Trade Associates: _____

Mentors:

SPECIAL INTERESTS:

Club Memberships: _____

Politically Active? _____

Active in Community? _____

Religious Involvement?

LIFESTYLE:

Favorite Foods / Dietary Restrictions: _____

Hobbies: _____

Favorite Vacation: _____

Kind of Car / Boat: _____

Smoker / Drinker? _____