

**LIBERTY EXCESS & SURPLUS, INC  
8 B SMEDLEY LANE  
NEWTOWN SQUARE, PA 19073  
www.libertyexcess.com**

**AGENCY QUESTIONNAIRE**

**Agency Name** \_\_\_\_\_

**Principal Names** \_\_\_\_\_

**Physical Address** \_\_\_\_\_

**Mailing Address (if different from above)** \_\_\_\_\_

**EmailAddress** \_\_\_\_\_ **Website** \_\_\_\_\_

**Agency is: Proprietorship Partnership LLC Corporation**

**Tax ID Or Social Security #** \_\_\_\_\_ **Date Agency Established** \_\_\_\_\_

**Agency License #** \_\_\_\_\_ **State** \_\_\_\_\_ **Expiration Date** \_\_\_\_\_

**Agency Premium Volume \$** \_\_\_\_\_ **Number of Employees** \_\_\_\_\_

**List Five Largest Carriers Business placed through** \_\_\_\_\_

**Percentage of Business – Commercial** \_\_\_\_\_ **Personal Lines** \_\_\_\_\_

**Present E& O Insurance Carrier** \_\_\_\_\_ **Exp Date** \_\_\_\_\_

**Has agency every had a license denied, revoked or suspended, cancelled or non-renewed by any State? Yes or No**

**Has Agency or Agency Principal filed for or been discharged from any bankruptcy, insolvency or assignment for the benefit of creditors with a filing or discharge date within the last five years? Yes or No**

**Has the Agency ever been disciplined, fined or censured by a State Insurance Department or any regulatory body or court? Yes or No**

**Is the Agency now the subject of any complaint, investigation or proceeding that could result in a Yes answer to any of the previous questions? Yes or No**

