



# Agency Marketing Profile

**PLEASE TYPE OR PRINT YOUR ANSWERS.  
USE A SEPARATE SHEET IF NECESSARY.**

1. Name of Agency:  
DBA Name(s):
2. Business Address  
Street:  
City: County: State: Zip:
3. Mailing Address: (if different from above)  
Street:  
City: County: State: Zip:
4. Telephone: E-mail: Fax:
5. Primary Agency Contact:  
Telephone: E-mail: Fax:
6. FEIN:

## AGENCY BACKGROUND

1. Year business was established:
2. Current year estimated revenue: \$
  - a. 

<b>Percentage Benefits:</b>	%
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  - b. 

<b>Percentage Commercial P&amp;C:</b>	%
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  - c. 

<b>Percentage Personal Lines:</b>	%
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3. Commercial P&C business written through wholesalers: %
4. List top five insurance carriers:

Insurance Carrier	Premium
	\$
	\$
	\$
	\$
	\$

5. Year 1 PHLY production goal: \$

## AGENCY PRINCIPAL INFORMATION

Principal Officer	Email	Phone	Year Started with Agency

## AGENCY PREMIUM VOLUME AND DISTRIBUTION

*\*Please do not include Workers Compensation Premium*

Class of Business	Controlled Premium
<b>Human Services (Non-Profit/For-Profit)</b>	\$
<b>Churches/Religious Organizations</b>	\$
<b>Home Health Care</b>	\$
<b>BOP</b>	\$
<b>Accident &amp; Health</b> (Participant Accident, Volunteer Accident, & Student Accident)	\$
<b>Agribusiness</b> (Both Commercial and Farmowners)	\$
<b>Habitational Real Estate</b> (Including: Market Rate Apartments, Condominiums, HOAs, Affordable Housing, Mobile Home Parks)	\$
<b>Commercial Real Estate</b> (Including: Commercial Schedules, Nursing homes, Medical Facilities)	\$
<b>Entertainment &amp; Performing Arts</b> (including Venues, Performance Groups, Performing Arts Schools, and Film Productions & Videography)	\$
<b>Recreation</b> (Including: Family Entertainment Centers, Escape Rooms, Axe-Throwing, Camp Operators, and Fairs/Fairgrounds)	\$
<b>Sports</b> (Including Sports Camps & Leagues, Professional Teams & Arenas, Amateur Sports Facilities, and Ice Arenas)	\$
<b>Craft Breweries &amp; Distilleries</b>	\$
<b>Health &amp; Fitness</b> (Including: Gyms, Fitness Studios, Trainers & Spas)	\$
<b>Pool &amp; Spa Contractors</b>	\$
<b>Pest Control Services</b>	\$
<b>Security Services</b> (Including: Guard Services, Alarm Install/Monitoring & Armored Vehicle Transport)	\$
<b>Museums, Cultural Institutions, &amp; Libraries</b>	\$
<b>Schools</b> (including K-12 Charter/Private, Colleges/Universities, Student Housing, Driving & Vocational Schools)	\$
<b>Outdoor Products</b> (Including: Guides & Outfitters, Land Conservancies, Hunting Lodges/Preserve's, Bed & Breakfasts, Campgrounds, Rod & Gun Clubs)	\$
<b>Chauffeured Transportation</b>	\$
<b>Management &amp; Professional Liability</b> (Including: E&O, D&O, EPLI, Fiduciary, Cyber Security, Crime, Employed Lawyers, and Excess)	\$
<b>Integrated Technology</b>	\$
<b>Surety</b>	\$
<b>Staffing</b> (Including Temporary Placement and Direct Hire)	\$
<b>Manufacturing</b>	\$
<b>Non-admitted GL &amp; Property</b>	\$
<b>Environmental</b>	\$
<b>Special Events</b>	\$
<b>Monoline Excess</b>	\$
<b>Total:</b>	\$

Do you place any business through wholesalers or intermediaries for the above lines? Yes      No

If yes, what Lines?