



Legal name Of organization: _____ **DBA (If Different):** _____
Mailing address: _____ **Street address:** _____
Telephone #1: _____ **Telephone #2:** _____ **Fax #1:** _____
Federal I.D. #: _____ **Year business established:** _____ **Web site:** _____

How did you hear about The Distinguished Programs Group? (Check one)
 Referral Web site Search engine Mailing Publication Blast e-mail Trade show Other

Name of specific source: _____

Has someone reached out to you? Yes No

If yes, who? _____

About Your Business

Premium volume (select one):
 Under \$1,000,000 \$1,000,000 - \$5,000,000 \$5,000,000 - \$10,000,00 \$10,000,000 - \$25,000,000 Over \$50,000,000

Check specialty programs or classes of business (select all that apply):
 Generalist Hotels Marine Contractors Real Estate Professional Liability
 Transportation Clubs & Restaurants Retail Stores Manufacturing Museums Other _____

Would you describe your mix business to be (provide percentages – 100% Total): Commercial % Personal %

Percent of commercial real estate to total commercial business (select one): 10% or less 10-25% 25% or more

Marketing Territory (select all that apply): Local Statewide Multi-state

Which classes of real estate do you write (select all that apply):
 Garden Apartments Community Associations High Rises Commercial Buildings Shopping Malls Warehouses
 Smaller Joisted Masonry Senior Housing Student Housing Affordable Housing Other _____



E&O

Does your agency have E & O coverage? Yes No

***Please attach a copy of your E & O policy DEC page.**

***Please attach a copy of your Broker's License.**

Agency Personnel (Attach list if more space is needed)

| | |
|--------------------------------------|--------------|
| CEO / President _____ | E-mail _____ |
| Financial Officer _____ | E-mail _____ |
| Marketing Director/Coordinator _____ | E-mail _____ |
| Accounts Payable Contact _____ | E-mail _____ |
| Account Exec. _____ | E-mail _____ |
| Account Exec. _____ | E-mail _____ |
| Account Exec. _____ | E-mail _____ |

Marketing (Check one)

We have a centralized Commercial Lines Marketing Department: Yes No

This department markets (select one): New Business Renewals Both

Our Producers market their own accounts: Yes No

As respects to real estate, please list your top three companies and wholesale brokers.

Companies _____

Wholesale Brokers _____

Communications and Plans

Which of the following associations are you currently a member?

Big "I" PIA AAMGA NAIB WAIB AAM Other _____

Prepared By: _____ **Date:** _____

Title: _____ **Email:** _____ **Phone:** _____