



Legal Name Of Organization: _____ **DBA (If Different):** _____
Current Mailing Address: _____ **Current Street Address:** _____
Telephone #1: _____ **Telephone #2:** _____ **Fax #1:** _____ **Fax #2:** _____
Toll Free: _____ **Night #:** _____
Federal I.D. #: _____ **Year Business Established:** _____ **Website:** _____

How did you hear about The Distinguished Programs Group? (Check One)
 Referral Website Search Engine Mailing Publication Blast E-mail Other
Name of Specific Source: _____

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 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 Condos 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

Carrier: _____ Policy # _____ E & O Limits: _____

Deductible: _____ Expires: _____

*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 _____ Financial Officer _____

Marketing Director or Coordinator _____ Accounts Payable Contact _____

E&O

Marketing (Check one)

We have a centralized Commercial Lines Marketing Department: [] Yes [] No

Our Producers market their own accounts: [] Yes [] No

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

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 [] Other _____

What is your agency's value proposition? [] Price [] Service [] Specialization [] Other _____

Do you have any plans for your business in the next few years that would impact our relationship?

Prepared By: _____ Date: _____

Title: _____ Email: _____ Phone: _____