



# 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>	%
b. <b>Percentage Commercial P&amp;C:</b>	%
c. <b>Percentage Personal Lines:</b>	%
3. Commercial P&C business written through wholesalers: %
4. Top 5 P&C industry verticals:
  - a.
  - b.
  - c.
  - d.
  - e.
5. Year 1 PHLI production goal: \$

## AGENCY PRINCIPAL INFORMATION

1.	Principal Officer	Year Started with Agency

2. Is the Agency contact list attached? Yes No
3. Is the Office location list attached? Yes No
4. Is the E&O dec page attached? Yes No
5. Are copies of agency insurance licenses attached? Yes No

# OPERATIONS

[GO HERE](#) FOR THE PHLY NICHE SHEET TO REVIEW THE SPECIFIC CLASSES OF BUSINESS WE CURRENTLY WRITE WITHIN EACH DIVISION LISTED BELOW.

	Estimated Premium Currently Controlled By The Agency
<b>Human Service/ Non-Profit</b>	\$
<b>Agriculture</b>	\$
<b>Habitational/ Real Estate</b>	\$
<b>Outdoor Products</b>	\$
<b>Health &amp; Fitness</b>	\$
<b>Industry Services:</b>	
Pool Contractors	\$
Fuel Dealers	\$
Security Guards/ Alarm	\$
<b>Education</b>	\$
<b>Sports</b>	\$
<b>Recreation &amp; Entertainment</b>	\$
<b>Participant Accident</b>	\$
<b>Commercial Auto:</b>	
School Bus Contractors	\$
Chauffeured Transportation	\$
Auto Daily Rental	\$
<b>Management &amp; Professional Liability:</b>	
D&O/ EPLI	\$
Temporary Staffing	\$
Technology E&O and Package	\$
Miscellaneous E&O	\$
Crime	\$
<b>Commercial Flood</b>	\$
<b>Surety:</b>	
Contract	\$
Commercial	\$
<b>Excess &amp; Surplus:</b>	
Primary GL	\$
Excess	\$
Environmental	\$
<b>Business Owner Policy</b>	\$
<b>TOTAL</b>	\$