



IRVIN B. **GREEN & ASSOCIATES**, INC.

SPECIALTY INSURANCE MARKETS

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**AGENCY INFORMATION SHEET**

Name of Agency \_\_\_\_\_  
Street Address \_\_\_\_\_  
Mailing Address \_\_\_\_\_  
Phone \_\_\_\_\_ Fax \_\_\_\_\_ Date Agency Established \_\_\_\_\_  
Date Present Ownership Began (if different from above) \_\_\_\_\_  
E-mail Address \_\_\_\_\_  
If Corporation, Fed Tax ID# \_\_\_\_\_ If Sole Proprietor/Partnership SS# \_\_\_\_\_

**INFORMATION ON PRINCIPALS, COPORATE OFFICERS OR PARTNERS:**

Name	Title	Home Address	Years Held 2-20 license

**INFORMATION ON PERSONNEL:**

Name	Experience	Years Held 2-20 license

**COMPANIES AGENCY IS LICENSED WITH:**

Licensed Companies	Address (Where accounting is handled)	Write Standard Auto:	
		YES	NO

BROKERAGE FACILITIES USED: \_\_\_\_\_

**THREE LEADING MARKETS WITH PREMIUM AND LOSSES:**

Company	Approximate Volume	Loss Ratio

Total Annual Premium of All Lines (last year or fiscal year) \_\_\_\_\_

Does Agent/Owner have an affiliation with any other Agency (i.e. Franchise) \_\_\_\_\_ YES \_\_\_\_\_ NO

If YES, Indicate Agency(s) & Interest \_\_\_\_\_

Does agency carry Errors & Omissions Coverage? \_\_\_\_\_ YES \_\_\_\_\_ NO

If YES, With Whom? \_\_\_\_\_

What type of accounting system is used? \_\_\_\_\_ In House Computer \_\_\_\_\_ Computer Service Bureau  
\_\_\_\_\_ Commercial Manual \_\_\_\_\_ Agency Manual

Does each insured have a ledger card to keep records on account receivables? \_\_\_\_\_ YES \_\_\_\_\_ NO

\_\_\_\_\_ OTHER, Explain \_\_\_\_\_

Does Agency maintain a log that is in accordance with Statute 626.752? \_\_\_\_\_ YES \_\_\_\_\_ NO

Describe your "Suspense" System \_\_\_\_\_

Do you have a Control System of your Expirations? \_\_\_\_\_ YES \_\_\_\_\_ NO

Owner's Signature \_\_\_\_\_ Date \_\_\_\_\_

*Owner agrees that He/She (1) Will comply with the Accounting procedures of Irvin B. Green & Associates, Inc. and (2) Agrees to be responsible for debts and obligations of the agency until such time as Irvin B. Green & Associates, Inc. has been notified in writing of the sale of the agency.*

**\* PLEASE ATTACH A PHOTOCOPY OF CURRENT 2-20 LICENSE**

**\* PLEASE ATTACH A PHOTOCOPY OF CURRENT E&O DEC PAGE**