

MOTOR TRANSPORT MUTUAL RISK RETENTION GROUP

PRODUCER PROFILE

Name of Agency: _____

Mailing Address: _____

Physical Address: _____

Phone: _____ Cell: _____ Fax: _____

Email: _____ Website: _____

FEDERAL ID or Social Security #: _____

Agency License #: _____ Issue Date: _____ Expiration Date: _____

BACKGROUND

Year business established: _____ Date Incorporated: _____

During the past 5 years has the firm been acquired or merged with another firm or has the firm changed names?

☐ Yes ☐ No. If yes, reason: _____

Is the Producer engaged in, owned by, associated with or controlled by any other business interests?

☐ Yes ☐ No. If yes, name of firm: _____

PRINCIPALS AND LICENSED PERSONNEL

<u>Name of Principal(s)</u>	<u>Position</u>	<u>% of Ownership</u>	<u>Years at Agency</u>	<u>Email address</u>

<u>Name - Licensed (attach separate sheet if necessary)</u>	<u>License Number</u>	<u>Years Licensed</u>	<u>Years at Agency</u>	<u>Email address</u>

AGENCY QUESTIONNAIRE

Are you a (check all that apply): ☐ Surplus Lines Agent ☐ MGA ☐ Wholesaler ☐ Subsidiary ☐ Retail Agency (if applicable): Surplus Lines License # _____ Issue Date: _____ Expiration Date: _____

Do you accept and commercial business from other agents (double brokering)? ☐ Yes ☐ No. If yes, GWP _____%

Are you a subsidiary of any "parent" company or entity? ☐ Yes ☐ No. Firm is _____% Retail _____% Wholesale

Have any carrier contracts been terminated or non-renewed by you or with your agency in the past 24 months?

☐ Yes ☐ No. If yes, name of the company and reason for termination(s): _____

Does your agency have any balance due companies that are over sixty (60) days? ☐ Yes ☐ No. If yes, explain: _____

List of current MGA's or wholesalers you do business with: _____

Do you write business outside your State? __Yes __No. Non-resident #/States: _____

<u>List the Five (5) largest companies in rank by premium</u>	<u>Approximate Volume</u>	<u>Loss Ratio</u>

FINANCIAL

Accounting address, if different: _____

Contact: _____ Email: _____

Indicate E & O Carrier (attach a copy of Declarations Page)

Company: _____ Limit: _____

Policy #: _____ X-date: _____

How many E & O claims have you or your agency had in the past 5 years? If any, describe below _____

Has any E & O insurance ever been cancelled or increased due to claims activity/poor loss results? ☐ Yes ☐ No.

If yes, what years? _____

Has anyone in your company been under investigation, received disciplinary action or convicted by any regulatory body with respects to unfair business practices, deceptive trade practices, insurance fraud or other violations?

☐ Yes ☐ No. If yes, explain: _____

Any pending or threatened litigation or judgments in the past 5 years exceeding \$10,000 against the agency or any principals? ☐ Yes ☐ No. if yes, describe: _____

The Fair Credit Reporting Act Public Law 91-508 requires us to disclose to the prospective producer, that as part of our routine procedure, the Company may inquire as to the character, general reputation, personal characteristics and mode of living of said prospective producer. This information will be obtained through a regular reporting company, usually the Retail Credit Company.

THE UNDERSIGNED HEREBY DECLARES THAT THE ANSWERS GIVEN WITH RESPECT TO THE FOREGOING QUESTIONS ARE TRUE, COMPLETE AND ACCURATE WITH NO MISREPRESENTATIONS, OMISSIONS OR ANY OTHER CONCEALMENT OF FACT. I FURTHER UNDERSTAND THAT ANY INFORMATION PROVIDED IN THIS PROUDCER PROFILE WILL BECOME PART OF THE PRODUCER AGREEMENT, IF APPROVED.

X _____
Producer Authorized Signature

Title: _____

Date: _____

Type/Printed Authorized Signature

Note: Please email completed questionnaire, broker agreement, copy of current E&O, resident license and non- resident license for all other writing states to: trogers@mtmanagers.com Your application will be reviewed for approval. If approved, you will be assigned an agency code and will be notified by email.

Thank you for doing business with Motor Transport Managers, LLC.

*****Please attach a copy of your agency errors and omissions policy declaration page. A minimum of a \$1,000,000 limit is required to be approved as an Motor Transport Managers, LLC Producer.*****