

## Agency Information

Agency Name:

Agency Contact:

Phone Number:

Email Address:

Agency Location (City/State):

How did you hear about Chenango Brokers?

Years in Business:

Number of Office Locations:

Number of Employees/Producers:

States Where You Write Business:

## Production Profile

Do you write Personal Lines?

☐ Yes

☐ No

Approximate Personal Lines Premium:

Do you write Commercial Lines?

☐ Yes

☐ No

Approximate Commercial Lines Premium:

Approximate Total Agency Written Premium:

## Business Mix and Market Access

Primary Classes of Business Written:

Do you specialize in any classes or industries?

Current Wholesale Brokerage Partners:

Direct Carrier Appointments:

Are there any carriers or markets you are specifically looking to access?

Approximately how many personal/commercial submissions do you send to wholesalers each month?

☐ 1-5      ☐ 6-10      ☐ 11-25      ☐ 26-50      ☐ 50+

What types of accounts are you most frequently looking to place through a wholesaler?

Are you primarily seeking:

- ☐ E&S Markets  
☐ Admitted Markets  
☐ Specialty Programs

**Are you and your office staff familiar with completing:**

|                                   | Yes                      | Somewhat                 | No                       |
|-----------------------------------|--------------------------|--------------------------|--------------------------|
| ACORD Applications                | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Carrier Supplemental Applications | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Statement of Values               | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Loss Runs                         | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Comments:

## Current Challenges and Relationship Fit

What challenges are you experiencing in today's marketplace?

- ☐ Market Availability
- ☐ Pricing
- ☐ Turnaround Time
- ☐ Appetite Restrictions
- ☐ Difficult Classes
- ☐ Carrier Capacity
- ☐ Other

What opportunities do you see for Chenango Brokers to assist your agency?

What do you value most in a wholesale relationship?

- |                                                          |                                                 |
|----------------------------------------------------------|-------------------------------------------------|
| <input type="checkbox"/> Fast Turnaround                 | <input type="checkbox"/> Market Access          |
| <input type="checkbox"/> Competitive Pricing             | <input type="checkbox"/> Underwriting Expertise |
| <input type="checkbox"/> Communication                   | <input type="checkbox"/> Customer Service       |
| <input type="checkbox"/> Technology / Ease of Submission | <input type="checkbox"/> Problem Solving        |
| <input type="checkbox"/> Carrier Relationships           | <input type="checkbox"/> Other                  |

Why do you believe Chenango Brokers would be a good mutual fit for your agency?

How soon are you looking to begin submitting business?

- ☐ Immediately
- ☐ Within 30 Days
- ☐ Within 60-90 Days
- ☐ Exploring Future Options

Overall Impression:

- ☐ Excellent Fit      ☐ Good Fit      ☐ Moderate Fit      ☐ Poor Fit

Approved By:

Date: