

***Mover's Choice Insurance Program***

***1827 Clay Street***

***Napa, CA 94559***

***(800) 852-1968***

**AGENCY QUESTIONNAIRE**

Agency Name: \_\_\_\_\_

Agency Address: \_\_\_\_\_

\_\_\_\_\_

Mailing Address (If different than above): \_\_\_\_\_

\_\_\_\_\_

Telephone Number: \_\_\_\_\_ Fax Number: \_\_\_\_\_

Principal's License #: \_\_\_\_\_ Expiration Date: \_\_\_\_\_

*(Attach Copies of State P&C Agency & Individual Insurance Licenses)*

Corporation

Partnership

Individual

Agency Federal Tax ID Number: \_\_\_\_\_

Year Business Established: \_\_\_\_\_

States where licensed: \_\_\_\_\_

\_\_\_\_\_

List All Branch Offices: \_\_\_\_\_

\_\_\_\_\_

Has any license of agency or principle ever been revoked or suspended?  Yes  No

If "Yes", please explain. \_\_\_\_\_

Financial Information

Banking References :            Bank Name: \_\_\_\_\_  
   Phone #: \_\_\_\_\_  
   Contact Name: \_\_\_\_\_

Name of Agency Accounting Contact: \_\_\_\_\_  
Phone Number: \_\_\_\_\_

Annual Volume

Transportation: \_\_\_\_\_                      Non-Transportation: \_\_\_\_\_

Transportation Experience Questionnaire

- Does your agency currently specialize in the transportation industry? (Trucking and/or Moving & Storage)?
- Who is your transportation team leader?
- What percentage of your current book of business is transportation related?                      %
- How many producers do you have dedicated to the transportation industry?
- Does your agency currently sell a Moving & Storage Commercial Package Program (i.e. Property, GL, Auto, Cargo, Warehouse, and Workers' Compensation)? (If yes, indicate the program and premium volume)
- How would you rate your agency's ability to sell our Moving & Storage program?

EXCELLENT                      GOOD                      FAIR                      POOR

What is your agency's premium goal for this program over the next six months? \_\_\_\_\_

**INFORMATION NEEDED**

**# 1. PLEASE ENCLOSE A BROCHURE OR A LETTER GIVING A HISTORY AND BACKGROUND OF YOUR AGENCY.**

**#2. PLEASE SUBMIT A COPY OF YOUR AGENCY LICENSE AND DECLARATION PAGE OF E&O POLICY.**