

## **Professional Liability Indication Form**

Agency:					
Full Address:					
Contact:			Phone:	Phone:	
Email:			Website:		
Year Established: # of years in business:			Total Number of Staff:	Licensed Staff:	
P&C Premium:			P&C Commissions:		
Life/A&H Premium:			Life/A&H Commissions:		
Total Premium Volume:			Total Commissions:		
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Percentage of Revenue derived as a: Retail Agency% Wholesaler% Surplus Lines Broker% MGA%					
Business placed w/insurers less than B+ (AM Best):%					
Lines of Business placed (total of all sections must equal 100%):					
	COMMERCIAL		Farm Owners & Livestock Mortality	%	
	Auto – Standard	%	Crop/Hail (Crop Supp. Required)	%	
	Auto – Non-standard	%	Other (specify)	%	
	SMP/BOP	%	PERSONAL		
	CGL	%	Auto – Standard	%	
	Umbrella/Excess	%	Auto – Nonstandard	%	
	Workers Comp	%	Homeowners	%	
	Long Haul Trucking	%	Flood	%	
	Inland Marine	%	Umbrella	%	
	Ocean/Wet Marine	%	Pleasure boats	%	
	Bonds	%	Other (specify)	%	
	Aviation	%	A&H	24	
	Medical Malpractice	%	Individual	%	
	Prof Liability (E&O/D&O)	%	Group	%	
	Energy/Pollution/Environmental	%	24	0/	
	Liquor Liability	%	Mutual Funds	<u>%</u>	
Any services other than insurance agent/broker (Financial Planning, Real Estate, Tax Advice, etc.)? Yes No					
Percentage of business that is Direct Bill:% Does your agency use an exposure checklist?YesNo					
Does your agency have an office procedure manual? Yes No					
Claims in the past five years? YES NO (if yes, please provide # of claims, claim details and loss runs)					
Claims in the past five years:					
Current E&O Premium: Current E&O Carrier:					
Current E&O Limits: Deductible:					
Per claim / Aggregate Per claim / Aggregate					
Defense Outside Limits? ☐ Yes ☐ No Deductible applies to: ☐ Loss Only ☐ Loss & Claims Expenses					
Effective Date: Retroactive Date:					
Do you purchase data breach, privacy or cyber risk insurance for the Agency ? YES NO					
Are you aware of any circumstance, error or omission which may result in a claim against any of the companies or					
individuals proposed to be insured?   YES   NO					
Important Note: Completion of this premium indication form and any resulting indication of premium released by the company does not obligate company to					
bind coverage, and/or issue an insurance policy. The right to decline to quote after risk assessment is retained by company.					
Submitted by:					