

## AGENT APPOINTMENT APPLICATION

Agency Name: \_\_\_\_\_ Years in Business: \_\_\_\_\_  
 Agency DBA (if applicable): \_\_\_\_\_ Number of Agency Locations: \_\_\_\_\_  
 Agency Mailing Address: \_\_\_\_\_  
 Agency Physical Address: \_\_\_\_\_  
 Additional Location Address (1): \_\_\_\_\_  
 Additional Location Address (2): \_\_\_\_\_  
 Agency Phone: \_\_\_\_\_ Agency Fax: \_\_\_\_\_  
 Agency Website: \_\_\_\_\_ Agency FEIN: \_\_\_\_\_  
 Agency Contact Email: \_\_\_\_\_  
 Agency Underwriting Email: \_\_\_\_\_

Type of Ownership: SOLE PROPRIETOR ☐ PARTNERSHIP ☐ CORPORATION ☐ LLC ☐ FRANCHISE/CLUSTER GROUP ☐

Agency TDI License #: \_\_\_\_\_ E&O Coverage Limit: \_\_\_\_\_  
 Hours of Operation: \_\_\_\_\_ E&O Deductible Amount: \_\_\_\_\_  
 Business Entity NPN #: \_\_\_\_\_ E&O Expiration Date: \_\_\_\_\_  
 Lexis Nexus Node ID #: \_\_\_\_\_

Principle Agent Name: \_\_\_\_\_ Agent DOB: \_\_\_\_/\_\_\_\_/\_\_\_\_  
 Principle Agent SSN #: \_\_\_\_-\_\_\_\_-\_\_\_\_ Principle Agent Cell Phone: \_\_\_\_\_  
 Principle Agent TXDL #: \_\_\_\_\_  
 Principle Agent Email: \_\_\_\_\_

### How did you hear about Aspen MGA? Check all that apply.

☐ COMPARATIVE RATER \_\_\_\_\_ ☐ INDUSTRY EVENT \_\_\_\_\_ ☐ ASPEN EMAIL  
☐ ASPEN REPRESENTATIVE \_\_\_\_\_ ☐ FACEBOOK ☐ TWITTER ☐ LINKEDIN  
☐ INDUSTRY WEBSITE \_\_\_\_\_ OTHER \_\_\_\_\_

What Comparative Rater/Multi-Rater does your agency utilize?

ITC TURBO RATER ☐ QUICKQUOTE/QQ ☐ EZLYNX ☐ PLRATER ☐ OTHER \_\_\_\_\_

Please list any industry organization affiliations: \_\_\_\_\_

Is your agency present on any of the following social media sites?

☐ FACEBOOK \_\_\_\_\_ ☐ TWITTER \_\_\_\_\_  
☐ LINKEDIN \_\_\_\_\_ ☐ INSTAGRAM \_\_\_\_\_

What management program does your agency use? \_\_\_\_\_

What is the agency's main source of advertisement? \_\_\_\_\_

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Total Annual Production for all lines: \$ \_\_\_\_\_

Percentage of production per line (should sum to 100%):

Auto \_\_\_\_\_%      Residential \_\_\_\_\_%      Commercial \_\_\_\_\_%      Life/Health \_\_\_\_\_%

Please list the agencies current top three auto insurance carriers:

1) \_\_\_\_\_ 2) \_\_\_\_\_ 3) \_\_\_\_\_

Please list the agencies current top three homeowner carriers:

1) \_\_\_\_\_ 2) \_\_\_\_\_ 3) \_\_\_\_\_

Please list the agencies top three commercial auto insurance carriers:

1) \_\_\_\_\_ 2) \_\_\_\_\_ 3) \_\_\_\_\_

### Has the Principle, Agency, Agent or any staff member ever:

Been refused or had a Surety Bond cancelled for cause? Y ☐ N ☐

Been arrested, charged, indicted or convicted of a felony or misdemeanor? Y ☐ N ☐

Been known by another name (business or personally)? If yes, list "also known as" name(s) below: Y ☐ N ☐

Had an insurance license refused, denied, suspended or revoked? Y ☐ N ☐

Been disciplined by any insurance regulatory body? Y ☐ N ☐

Had an E&O claim? Y ☐ N ☐

Been terminated or placed on moratorium by another carrier or MGA? Y ☐ N ☐

Does the Principle Agent or any staff member currently work for any Texas MGA or insurance company? If yes, please list name of company below: Y ☐ N ☐

Filed bankruptcy, been sued, or had judgement entered? Y ☐ N ☐

Had a prior appointment with Aspen MGA or Tower Hill? Y ☐ N ☐

***As the Agency Principle, I hereby declare the information provided in this document to be true and correct.***

**Agency Principle Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Please Print Name:** \_\_\_\_\_

***Please email completed form to [Contracts@AspenMGA.com](mailto:Contracts@AspenMGA.com) for review***