



**Retail Agency Profile Form**  
**CONFIDENTIAL**

Please complete and return this form to:  
Missy Rodriguez, Executive Vice President  
Email: [mrodriguez@bbprograms.com](mailto:mrodriguez@bbprograms.com)  
Direct: 954-453-6295

**REQUIRED FORMS:**

- \* Agency E&O Certificate
- \* Applicable Agent Resident Licenses
- \* IRS FORM W9

**AGENCY INFORMATION:**

<b>Agency Name:</b>				<b>Website:</b>			
<b>Street Address</b>				<b>City:</b>			
<b>State</b>		<b>Zip:</b>		<b>Phone:</b>		<b>Fax:</b>	
<b>TAX ID</b>							

**CONTACT INFORMATION:**

<b>Principle Contact</b>						<b>Email:</b>			
<b>Job Title:</b>				<b>Department</b>				<b>Direct #</b>	

<b>Marketing Contact</b>						<b>Email:</b>			
<b>Job Title:</b>				<b>Department</b>				<b>Direct #</b>	

<b>Accounting Contact</b>						<b>Email:</b>			
<b>Job Title:</b>				<b>Department</b>				<b>Direct #</b>	

<b>Agent Contact</b>						<b>Email:</b>			
<b>Job Title:</b>				<b>Department</b>				<b>Direct #</b>	
<b>Agent Resident License #</b>				<b>State</b>				<b>Additional Producers-attach separate sheet</b>	

**OPERATIONS INFORMATION:**

1. How is the organization licensed? (Choose all that apply)  
 Agent     Broker     E&S     Other: \_\_\_\_\_

2. Confirm that you/your agency are fully licensed in the states you are submitting business:  
 YES     NO

3. Organizational Staff at your location:

Principals	
Producers	
Other Licensed Staff	
Total	

4. Is your agency an MGA/Administrator for any exclusive Programs?  YES  NO  
If yes, explain: \_\_\_\_\_



**PREMIUM VOLUME & DISTRIBUTION:**

Professional Liability Line	Approx Premium Volume	Carrier/Brokers used	States
Lawyers			
Accountants			
Med Mal			
Architects			
Other:			

**FINANCIAL & OTHER INFORMATION:**

- Do you maintain Employee Dishonesty Coverage for all Officers and Employees?  
 Yes  No
- Do you Maintain Errors & Omission Coverage?  
 Yes  No
- Have you or any officer, director or member of your organization ever had an insurance license suspended or terminated for any reason, or ever been subject to any disciplinary action?  
 Yes  No.  
If Yes, please explain: \_\_\_\_\_
- Is there any pending or threatened litigation or judgments within the past five years exceeding \$10,000 against the broker or any principals of the organization?  
 Yes  No  
If Yes, please explain: \_\_\_\_\_

\_\_\_\_\_  
Principal/Owner Signature

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Date