

# The McGowan Companies

Home Office: Old Forge Centre - 20595 Lorain Rd. - Fairview Park, OH 44126 - P: (440) 333-6300 - F: (440) 333-3214

## Brokerage Questionnaire

Please complete this "Broker Questionnaire" and fax or e-mail it back to us. We require this form in order to begin working with your firm (or, if you are a current broker, to update our records and continue working with your firm).

**Brokerage Name:** \_\_\_\_\_

**Brokerage Mailing Address:** \_\_\_\_\_ (Main Office)

\_\_\_\_\_

**Brokerage Physical Address:** \_\_\_\_\_ (Main Office)

\_\_\_\_\_

**Brokerage Phone:** (\_\_\_\_) \_\_\_\_ - \_\_\_\_\_ (Main Office)

**Brokerage Fax:** (\_\_\_\_) \_\_\_\_ - \_\_\_\_\_ (Main Office)

**Corporate Structure:**  Individual / Sole Proprietor  S-Corp.  C-Corp.

Partnership  Trust/Estate

**Tax ID Number (FEIN):** \_\_\_\_\_ - \_\_\_\_\_

**Agency NPN: (National Producer Number)** \_\_\_\_\_

**E&O Carrier:** \_\_\_\_\_

**E&O Policy Term:** \_\_\_\_/\_\_\_\_/20\_\_ - \_\_\_\_/\_\_\_\_/20\_\_

**E&O Limits:** \$\_\_\_\_\_ Per Occurrence / \$\_\_\_\_\_ Annual Aggregate

**Fidelity Carrier:** \_\_\_\_\_

**Fidelity Policy Term:** \_\_\_\_/\_\_\_\_/20\_\_ - \_\_\_\_/\_\_\_\_/20\_\_

**Fidelity Limits:** \$\_\_\_\_\_ Per Occurrence / \$\_\_\_\_\_ Annual Aggregate

**Resident P&C License Number:** \_\_\_\_\_ (Brokerage Firm)

**Licensing Contact:** \_\_\_\_\_

**Licensing Contact's Email Address:** \_\_\_\_\_

**Line of Business in Which Brokerage Specializes:** \_\_\_\_\_

\_\_\_\_\_

**Office Location #1 (Main Office or Administrative Office)**

**Address:** \_\_\_\_\_ Phone: ( ) \_\_\_\_\_ - \_\_\_\_\_  
\_\_\_\_\_ Fax: ( ) \_\_\_\_\_ - \_\_\_\_\_  
\_\_\_\_\_

**Staff:**

(1) **Head of Organization:** \_\_\_\_\_ Title: \_\_\_\_\_  
(Ex.- President or Mg. Partner)

Direct Line: ( ) \_\_\_\_\_ - \_\_\_\_\_ Direct Fax: ( ) \_\_\_\_\_ - \_\_\_\_\_  
Phone Extension: x \_\_\_\_\_ E-Mail: \_\_\_\_\_

(2) **Marketing Manager:** \_\_\_\_\_

Direct Line: ( ) \_\_\_\_\_ - \_\_\_\_\_ Direct Fax: ( ) \_\_\_\_\_ - \_\_\_\_\_  
Phone Extension: x \_\_\_\_\_ E-Mail: \_\_\_\_\_

(3) **Commercial Lines Manager:** \_\_\_\_\_

Direct Line: ( ) \_\_\_\_\_ - \_\_\_\_\_ Direct Fax: ( ) \_\_\_\_\_ - \_\_\_\_\_  
Phone Extension: x \_\_\_\_\_ E-Mail: \_\_\_\_\_

(4) **Accounting Contact:** \_\_\_\_\_ Position: \_\_\_\_\_

Direct Line: ( ) \_\_\_\_\_ - \_\_\_\_\_ Direct Fax: ( ) \_\_\_\_\_ - \_\_\_\_\_  
Phone Extension: x \_\_\_\_\_ E-Mail: \_\_\_\_\_

(5) **Producer #1:** \_\_\_\_\_ Position: \_\_\_\_\_

Direct Line: ( ) \_\_\_\_\_ - \_\_\_\_\_ Direct Fax: ( ) \_\_\_\_\_ - \_\_\_\_\_  
Phone Extension: x \_\_\_\_\_ E-Mail: \_\_\_\_\_

(6) **Producer #2:** \_\_\_\_\_ Position: \_\_\_\_\_

Direct Line: ( ) \_\_\_\_\_ - \_\_\_\_\_ Direct Fax: ( ) \_\_\_\_\_ - \_\_\_\_\_  
Phone Extension: x \_\_\_\_\_ E-Mail: \_\_\_\_\_

(7) **Producer #3:** \_\_\_\_\_ Position: \_\_\_\_\_

Direct Line: ( ) \_\_\_\_\_ - \_\_\_\_\_ Direct Fax: ( ) \_\_\_\_\_ - \_\_\_\_\_  
Phone Extension: x \_\_\_\_\_ E-Mail: \_\_\_\_\_

(8) **CSR #1:** \_\_\_\_\_ Position: \_\_\_\_\_

Direct Line: ( ) \_\_\_\_\_ - \_\_\_\_\_ Direct Fax: ( ) \_\_\_\_\_ - \_\_\_\_\_  
Phone Extension: x \_\_\_\_\_ E-Mail: \_\_\_\_\_

(9) **CSR #2:** \_\_\_\_\_ Position: \_\_\_\_\_

Direct Line: ( ) \_\_\_\_\_ - \_\_\_\_\_ Direct Fax: ( ) \_\_\_\_\_ - \_\_\_\_\_  
Phone Extension: x \_\_\_\_\_ E-Mail: \_\_\_\_\_

(10) **CSR #3:** \_\_\_\_\_ Position: \_\_\_\_\_

Direct Line: ( ) \_\_\_\_\_ - \_\_\_\_\_ Direct Fax: ( ) \_\_\_\_\_ - \_\_\_\_\_  
Phone Extension: x \_\_\_\_\_ E-Mail: \_\_\_\_\_

**Office Location #: \_\_\_\_\_ (Satellite Office)**

**Address:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Phone: ( ) \_\_\_\_\_ - \_\_\_\_\_  
Fax: ( ) \_\_\_\_\_ - \_\_\_\_\_

**Staff:**

(1) Branch Manager: \_\_\_\_\_ Title: \_\_\_\_\_  
Direct Line: ( ) \_\_\_\_\_ - \_\_\_\_\_ Direct Fax: ( ) \_\_\_\_\_ - \_\_\_\_\_  
Phone Extension: x \_\_\_\_\_ E-Mail: \_\_\_\_\_

(3) Marketing Manager: \_\_\_\_\_  
Direct Line: ( ) \_\_\_\_\_ - \_\_\_\_\_ Direct Fax: ( ) \_\_\_\_\_ - \_\_\_\_\_  
Phone Extension: x \_\_\_\_\_ E-Mail: \_\_\_\_\_

(3) Commercial Lines Manager: \_\_\_\_\_  
Direct Line: ( ) \_\_\_\_\_ - \_\_\_\_\_ Direct Fax: ( ) \_\_\_\_\_ - \_\_\_\_\_  
Phone Extension: x \_\_\_\_\_ E-Mail: \_\_\_\_\_

(4) Accounting Contact: \_\_\_\_\_ Position: \_\_\_\_\_  
Direct Line: ( ) \_\_\_\_\_ - \_\_\_\_\_ Direct Fax: ( ) \_\_\_\_\_ - \_\_\_\_\_  
Phone Extension: x \_\_\_\_\_ E-Mail: \_\_\_\_\_

(5) Producer #1: \_\_\_\_\_ Position: \_\_\_\_\_  
Direct Line: ( ) \_\_\_\_\_ - \_\_\_\_\_ Direct Fax: ( ) \_\_\_\_\_ - \_\_\_\_\_  
Phone Extension: x \_\_\_\_\_ E-Mail: \_\_\_\_\_

(6) Producer #2: \_\_\_\_\_ Position: \_\_\_\_\_  
Direct Line: ( ) \_\_\_\_\_ - \_\_\_\_\_ Direct Fax: ( ) \_\_\_\_\_ - \_\_\_\_\_  
Phone Extension: x \_\_\_\_\_ E-Mail: \_\_\_\_\_

(7) Producer #3: \_\_\_\_\_ Position: \_\_\_\_\_  
Direct Line: ( ) \_\_\_\_\_ - \_\_\_\_\_ Direct Fax: ( ) \_\_\_\_\_ - \_\_\_\_\_  
Phone Extension: x \_\_\_\_\_ E-Mail: \_\_\_\_\_

(8) CSR #1: \_\_\_\_\_ Position: \_\_\_\_\_  
Direct Line: ( ) \_\_\_\_\_ - \_\_\_\_\_ Direct Fax: ( ) \_\_\_\_\_ - \_\_\_\_\_  
Phone Extension: x \_\_\_\_\_ E-Mail: \_\_\_\_\_

(9) CSR #2: \_\_\_\_\_ Position: \_\_\_\_\_  
Direct Line: ( ) \_\_\_\_\_ - \_\_\_\_\_ Direct Fax: ( ) \_\_\_\_\_ - \_\_\_\_\_  
Phone Extension: x \_\_\_\_\_ E-Mail: \_\_\_\_\_

(10) CSR #3: \_\_\_\_\_ Position: \_\_\_\_\_  
Direct Line: ( ) \_\_\_\_\_ - \_\_\_\_\_ Direct Fax: ( ) \_\_\_\_\_ - \_\_\_\_\_  
Phone Extension: x \_\_\_\_\_ E-Mail: \_\_\_\_\_

Brokerage P&C			Individual P&C Licenses			Surplus Licensee		
STATE	EXP. DATE	LICENSE NUMBER	EXP. DATE	PRODUCER NAME	LICENSE NUMBER	EXP. DATE	AGENT/AGENCY NAME	LICENSE NUMBER
Alabama								
Alaska								
Arizona								
Arkansas								
California								
Colorado								
Connecticut								
Delaware								
District of Columbia								
Florida								
Georgia								
Hawaii								
Idaho								
Illinois								
Indiana								
Iowa								
Kansas								
Kentucky								
Louisiana								
Maine								
Maryland								
Massachusetts								
Michigan								
Minnesota								
Mississippi								
Missouri								
Montana								
Nebraska								
Nevada								
New Hampshire								
New Jersey								
New Mexico								
New York								
North Carolina								
North Dakota								
Ohio								
Oklahoma								
Oregon								
Pennsylvania								
Rhode Island								
South Carolina								
South Dakota								
Tennessee								
Texas								
Utah								
Vermont								
Virginia								
Washington								
West Virginia								
Wisconsin								
Wyoming								