



PROSPECTIVE AGENCY APPLICATION

***This application can only be reviewed once it is completed and submitted with:
E&O documentation, agents' license, and agency license.***

Agency Information

Agency Legal Name: _____ Date: _____

Street: _____ PO Box: _____

City: _____ State: _____ Zip Code: _____ County: _____

Agency Phone Number: _____ Agents Cell Number: _____

Agency Contact Name: _____ Email: _____

Accounting Contact Name: _____ Email: _____

Years Agency in Operation: _____ **(Resume required if less than 3 years in business)**

Tax ID: _____

Principal of Agency: _____ Title: _____

Direct Line Number: _____ Cell Phone: _____

Additional Locations (Addresses & Phone Number)

1. _____

2. _____

Personal Lines Contact

Name: _____ Email: _____

Which carriers are you directly appointed with? (Please check all that apply)

AIG	Employers	Main Street America
Allianz	FFVA	Nationwide
Allied World	Guard	State Auto
Amerisafe	Hartford	Tower Hill
AmTrust	Hiscox	Travelers
Chubb	ICAT	Zenith
CNA	ICW	Zurich
Crum & Forster	Liberty Mutual	

List all markets other than the above you have other than above on a direct basis:

Brokers you currently work with: _____

Approximate average commercial lines account size: \$ _____

Comm. Lines Volume: \$ _____ Personal Lines Volume: \$ _____

What geographical areas does your agency mostly write? List all states and areas: _____

What types of business does your agency mostly write? Commercial Personal

What classes of commercial business (i.e. Contractors, Building Owners – non-habitational or habitational, Manufacturers, Restaurants, Wholesalers, etc.) do you write?

List some recent successes for your agency:

What resources or markets can Halcyon offer to better assist you in writing business? _____

Estimated annual premium volume to be written with Halcyon (**Min. \$100k**): _____

Compliance Information

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 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: _____

How did you hear about Halcyon Underwriters? _____

Submitted by: _____ Title: _____ Date: _____

Please note the appointment applications are reviewed each Friday by the Marketing Team.

The average review time will take up to 14 days once all required items have been received.

If you have any questions, please email our marketing department at marketing@halcyonuw.com