



E&O EASY ESTIMATE



AGENCY INFORMATION

Named Insured: _____ Website: _____
 Physical Address: _____ Phone: _____
 Mailing Address: _____ E-mail: _____
 City/State/Zip: _____

Independent Agent / Agency? Yes No

Date Agency Established (current ownership): _____

Total Number of Locations: _____

Associations you are members of: _____

STAFF INFORMATION

Include ALL the following: Active Agency Principals / Licensed & Unlicensed Personnel / 1099's

Number of Full Time (over 20 hours): _____

Number Part Time (20 hours or less): _____

Number of Full Time Non-Employee, Non-Exclusive Producers: _____

Number of Part Time Non-Employee, Non-Exclusive Producers: _____

Insurance Designations* of staff equals or exceed 60% (CIC, CISR, PCPU, LUTCF, etc)? Yes No

**Does not include having a license.*

BUSINESS SEGMENTATION

Percentage of Total Agency Commission placed by line:

Personal Lines %	_____ %
Commercial Lines %	_____ %
Life & Health %	_____ %
Total	100%

Specialty Lines?* Yes No

If yes, what % of your income is placed as Specialty Lines? _____%

**Certain Specialty Lines of business may alter the premium and is subject to underwriting*

Percentage of P&C Business placed THRU other Agents or Brokers: _____%

AGENCY PREMIUM & REVENUE

Total Premium for top 5 Carriers: \$ _____

Total P&C Premium Volume: \$ _____

Total P&C Commission: \$ _____

Total Premium Volume: \$ _____

Total L&H Commission: \$ _____

Consulting Fee Income: \$ _____

E&O PREVENTION

Exposure Analysis Checklist used on ALL accounts (PL and CL – active at least 1 year)? DYes DNo

Date of E&O Loss Prevention Seminar last attended _____ # staff attended#_____

E&O claims / incidents in the last 5 years? (include closed with expense only payment) #_____

CURRENT E&O COVERAGE

Carrier: _____

Expiration Date: _____

Retro-Active Date : _____

Limits: _____

Deductible: _____

Deductible Type Loss Only Loss & Expense

Authorized Signature

Date

*This Questionnaire is for a PREMIUM INDICATION ONLY and is not an Offer of Coverage nor is it bindable.
If the premium indication is acceptable, you will be asked to complete a full E&O application.*

Return to:

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