PROCTOR FINANCIAL, INC.

Agency Information Application

PFI is required by the IRS to have a W-9 form on file.
Please include a completed W-9 with your application.

Submit | Print | Reset

Agency/Contact Information

Agency Name (Corp and d/b/a if applicable)

Agency Address	City	State	Zip
Main Contact Name	Main Contact Title		
Main Contact Phone	Fax	E-Mail	
Secondary Contact Name	Title	Phone	E-Mail
Agency is: ☐ **Individual** ☐ **Partnership** ☐ **Corporation** ☐ **LLC**	Agency is: ☐ **Subsidiary** ☐ **Parent**	Year Established	No. of Employees at Agency

If **Subsidiary**, List **Parent**; If **Parent**, List **Subsidiaries**:

List any previous agency names:

Compliance Information

Does the agency hold errors and omissions insurance?
☐ **Yes** ☐ **No**

(Please provide a copy of the declarations page or certificate of insurance with this application)

Please list the states in which the agency holds a P&C license

(Your agency will be required to provide a copy/copies of the P&C licenses only for states client is domicile/agency is licensed prior to binding)

Agency Information

Does the agency currently market products to financial lending institutions?
☐ **Yes** ☐ **No**

Please list any specific classes of business your agency writes or any exclusive programs

Does your agency have active memberships in any trade or professional associations? If so, please list (*for example: MBA, NAPSLO, etc.*)

Please list the carriers you currently represent:

Please list companies the agency has discontinued in the last 5 years and why.

Company Name	**Reason**

Please list Principles, Partners, Directors, and Managers of agency. **(Please provide a contact list if needed)**

Name	**Position**

If you have any questions regarding this application,
please call Kendra Pierce at 800.521.6800, ext. 5897 or klpierce@pfic.com