PROCTOR FINANCIAL

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

Application Date | Vendor Number | Client Number

Agency Name *(corp. & d/b/a if applicable)* | Agency Website

Agency Address | City | State | Zip

Main Contact Name | Main Contact Title

Main Contact Phone | Main Contact Fax | Main Contact E-Mail

Secondary Contact Name | Secondary Contact Title | Secondary Contact Phone | Secondary Contact E-Mail

Agency is:
☐ Individual ☐ Partnership ☐ Corporation ☐ LLC

Agency is:
☐ Subsidiary ☐ Parent

Year Established

Number of Employees at Agency

If subsidiary, list parent; if parent, list subsidiaries:

List any previous agency names:

How did you hear about PFI? - Explain:

Compliance Information

Does the agency hold errors & omissions insurance? *(please provide a copy of the declarations page or certificate of insurance with this application)*
☐ **Yes** ☐ **No**

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**

Is your agency affiliated or a subsidiary of any bank or mortgage servicer?
☐ **Yes** ☐ **No**

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.)*:

List the carriers you currently represent:

Please list companies the agency has discontinued in the last 5 years & why:

Company Name	Reason

Please list principles, partners, directors and managers of your agency:
(please provide a contact list if needed)

Name	Position

If you have any questions regarding this application,
contact Sales Support at 800.521.6800 or SS&AS@pfic.com