



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.

Agency/Contact Information

Note: Internet explorer is REQUIRED to use automatic submission feature. All other browsers are not supported and require manual download and return to salesupport@pfic.com.

Application Date		Vendor Number	Client Number
Agency Name <i>(corp. & d/b/a if applicable)</i>		Agency Website	
Agency Address		City	State
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		Year Established	Number of Employees at Agency
Agency is: Individual Partnership Corporation LLC		Agency is: Subsidiary Parent	
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? Is your agency affiliated or a subsidiary of any bank or mortgage servicers?

Yes No

Yes No *If yes, specify*

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 salesupport@pfic.com