



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@pfc.com.

Application Date		Vendor Number	Client Number	
Agency Name <i>(corp. & d/b/a if applicable)</i>		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

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@pfc.com