



**COMMON
★ SENSE ★
MARKETS**

UNDERGROUND STORAGE TANK (UST) AGENCY PROFILE FORM

Please fill out the information below and return to:

Fax: (979) 776-4787

E-mail: service@anco.com

Common Sense Markets, P.O. Box 4870, Bryan, TX 77805

★ AGENCY INFORMATION

Agency Name _____
Contact _____
Mailing Address _____
City _____ **ST** _____ **Zip** _____
County _____ **Telephone** _____
Fax _____ **Website address** _____
E-mail address _____
Tax ID _____ **Agency License #** _____
E&O Insurance Carrier _____ **E&O Limit** _____

★ AGENCY LOCATION

Main Location (City/State): _____
Satellite Offices (City/State): _____
Agency location: Single Residence Apartment Townhome Condo
 Strip Mall Multi-Unit Office Single Occupancy Commercial Building

★ OWNERSHIP

Type of Ownership: Sole Proprietorship Partnership Corporation LLC

Name(s) of Owners	Title	Years of Experience	
		PL	CL

Years CL Experience within Agency: _____

Year Agency Established: _____ **Number of years under current Ownership:** _____

Number of people in these Positions: _____ **Producers/Solicitors** _____ **CSR's** _____ **Other**

Check all Designations held within agency: CPCU CIC AAI CLU ACSR CISR

Does the agency have ownership in another agency? No Yes - Please provide name: _____

Does the agency have ownership in a captive? No Yes - Please provide name: _____

Is the agency a member of an aggregator, cluster, alliance, etc? No Yes - Please provide name: _____

★ OWNERSHIP (cont.)

Automation System(s) used: _____

Agency is automated for the following function: Bookkeeping/Rating/Management Bookkeeping Rating Only

★ UST CARRIERS & PRODUCTION

UST Carriers & Brokers:

All Risk ACE Burns & Wilcox Colony Crum & Forster Foss Hardy Mid-Continent

Tank Owner Members Top Tanks Tudor Insurance Co. USI Southwest

Other(s) _____

Which Carriers(s) is/are most competitive? _____

Top 3 UST Carriers:

	Written Premium	PIF
1.		
2.		
3.		

★ AGENCY VOLUME

Total Agency Volume: _____ Percentage of Volume is: _____ CL _____ PL _____ Life/Health _____ UST

How many UST policies do you currently have in your Agency? _____

Why are you looking for a new carrier(s)? _____

What New Business commitment can you make?

First Year PIF: _____ 2nd Year PIF: _____ 3rd Year PIF: _____

★ SALES & MARKETING

Check the following that apply to your Agency:

Use Lead Generation program Use Telemarketer Have Effective Cross-sell program

Have Re-solicitation program Focused on Niche programs Actively Up-sell customers

Motivated by Contests/Incentives Sell Small Group P&C Partner with Purchasing Groups

★ ADDITIONAL INFORMATION

What interests you about Common Sense Markets? _____

How did you hear about Common Sense Markets? Referral Internet Competitor Client Other