



Agency: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 Contact: \_\_\_\_\_ Phone/email: \_\_\_\_\_  
 Year Established: \_\_\_\_\_ Website: \_\_\_\_\_  
 P&C Premium Volume \_\_\_\_\_ P&C Commissions: \_\_\_\_\_  
 Life/A&H Premium \_\_\_\_\_ Life/A&H Commissions: \_\_\_\_\_  
 Total Staff: \_\_\_\_\_ Retail Agent/Broker: \_\_\_\_\_% Wholesaler: \_\_\_\_\_% MGA/MGU, GA, PA: \_\_\_\_\_%  
 Business placed w/ insurers less than(<) B+ (AM Best): \_\_\_\_\_% Any binding or u/w authority?  NO  YES

Lines of Business placed (total of all sections must equal 100%):

COMMERCIAL LINES		PERSONAL LINES	
BOP/CGL/Package	%	Homeowners	%
Property	%	Auto	%
Workers Comp	%	Other	%
Flood	%	<b>LIFE</b>	
Bonds	%	Individual	%
Professional Liability/D&O	%	Group	%
Crop Coverage	%	Annuities-Fixed	%
Long Haul Trucking	%	<b>A&amp;H</b>	
Ocean Marine	%	Individual	%
Medical Malpractice	%	Group	%
Livestock Mortality	%		
Aviation	%	Mutual Funds	%

Any services other than insurance agent/broker (Financial Planning, Real Estate, Tax Advice, etc)?  NO  YES

Any group self insurance or stop loss, MET, MEWA, Viatical or TPA services or sales?  NO  YES

Claims in the past five years?:  NO  YES (if yes, we must refer to the underwriter, provide claim details and loss runs)

Current E&O: Insurer: \_\_\_\_\_ Effective Date: \_\_\_\_\_

Limits: \_\_\_\_\_ Deductible: \_\_\_\_\_ Premium: \_\_\_\_\_ Retroactive Date: \_\_\_\_\_

Do you purchase data breach, privacy or cyber risk insurance for the Agency?  NO  YES

Are you aware of any circumstance, error or omission which may result in a claim against any of the companies or individuals proposed to be insured?  NO  YES

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

Forward completed application to:  
 Email: jay@canyonbrokers.com  
 OR  
 Fax: (888) 209-7554