



BROKERAGE PROFILE
Strictly Confidential

8 Wood Hollow Road
Parsippany, NJ 07054
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www.innocov.com

Brokerage Legal Name _____

() Corporation () Partnership () LLC () Other _____

Brokerage Trade Name _____

Mailing Address _____

Phone # () _____ Fax # () _____ E-mail _____

Location Address _____

Years operated under current name ____ Previous name(s) _____

Principal's Name	Title	Yrs Insurance Experience

Our Contact Person & Title _____

Automation System: Hardware _____ Software _____

Number of Employees _____ Number of Commercial Producers _____

Number of Employees with: CPCU _____ CIC _____ CISR _____ CPIW _____ ARM _____

Number of Producers with >75% of activity in Restaurant Business _____

Agency (not brokerage) contracts currently with (largest 4) carriers:

Carrier _____ Carrier _____

Carrier _____ Carrier _____

Firm's Total Commercial Business:

	Annual Premium	Annual Revenue	Approx # of Risks
Total (Incl restaurants)			
Restaurants Only			

Breakdown of firm's total restaurant business (either by Premium OR Revenue):

LOB	\$ Annual Premium	\$ Annual Revenue
Package		
Workers' Compensation		
Umbrella		
Auto		
Other		

Top 3 markets now used to place restaurant business: (1) _____

(2) _____ (3) _____

Loss Ratios for these 3 markets (Indicate whether for all business or restaurant business).

Attach carriers' premium/loss exhibits

Carrier	2016	2015	2014	Restaurant or All

What are the three biggest obstacles you face in attempting to increase your restaurant book of business:

How would you describe the methods you use to write new restaurant business and which do you find most successful:

Most successful: _____

Next most successful: _____

Next most successful: _____

E&O Carrier	
Policy Number	
Expiration Date	
Limits	
Deductible – Indemnity	
Deductible – Defense	

Profile completed by: _____ Date _____

**Mail to: Innovative Coverage Concepts, 8 Wood Hollow Road, Parsippany, NJ 07054
Personal and Confidential – Dean Carras**