



Name of Agency:

Name of Agency owner(s):

Agency License Number(s):

Agency Owner(s) License Number(s):

Email address of Agency Owner:

Agency phone number:

Agency website(s):

Agency Office Address (physical):

Does the agency have multiple locations? If yes, please provide a list of the locations.

Length of time in business:

Number of licensed producers in the office:

What are your primary personal lines property markets? Preferred/middle market/standard?

Which companies are your go-to property carriers?

What is the size of your books with those companies and what are your loss ratios over the last 3?  
years?

On average, how many property policies (HO3 & DP) do you write in a month?



How many policies do you feel comfortable committing to write through CSIS each month?

Does your agency belong to any insurance network groups, clusters, or insurance aggregator? If yes, please advise the name of the group(s):

Has the agency or agency owner(s) ever had any Department of Insurance actions against? If so, please explain and provide details.

Have you or the agency ever had an appointment or producer code with Bamboo in the past? (If you have previously been appointed with Bamboo and terminated, you are not eligible for a new appointment with Bamboo).

Has the agency ever been terminated by a carrier or wholesale broker for cause? If yes, please provide the details.

Has the agency had any E&O claims over \$10,000 in the last five (5) years? If yes, please provide the details.

Is the agency aware of any current or pending legal action(s)? If yes, please provide the details.

If there are any additional details you would like to provide, please advise.