

Insurance Agent/Agency Questionnaire

About the Borrower:

Name: _____ Email: _____ Cell Phone: _____

How many years insurance experience do you have? _____ How many with Allstate? _____

Are you a licensed agent? _____ If so, when were you licensed? _____

Please list the states in which you are licensed and your license #s: _____

Are you an R3001 Allstate agent? _____ If so, do you have an R3001C or R3001S Contract? _____

Please list all of your Allstate Agent #s and corresponding R3001 Contract dates: _____

Are you life insurance licensed? _____ Are you Series 6-63 licensed? _____

Have you acquired any books of business in the last 12 months? _____ If so, how many? _____

Who is your Market Sales Leader? _____ Email: _____

Phone: _____

Please complete the following if you currently own an Allstate agency (Please photocopy and attach a separate sheet for each agency owned):

Legal Name of Agency: _____

Legal Form of Agency (corporation, dba, etc.): _____

Current Agency Address: _____
City State Zip

Current Rental Rate: \$ _____ Telephone: (____) _____ (____) _____
Business Phone Business Fax

Do you plan to relocate the agency? _____ Anticipated agency relocation date: _____

Relocation Address: _____
City State Zip

Phone/E-mail: (____) _____ (____) _____
Office Phone Office Fax

Year agency was established: _____ Length of your ownership: _____

Do you have any debt on your agency? _____ Please list all lenders and amounts owed: _____

How many licensed staff do you employ? _____ How many unlicensed staff? _____

**Please complete the following if you have acquired another book of business in the past 3 years.
(If more than one book of business has been acquired, please photocopy and fill out a separate sheet for each agency acquired):**

Seller's Name: _____

Legal Name of Agency: _____

Legal Form of Agency (corporation, dba, etc.): _____

Purchased Agency Address: _____

City State Zip

Was the agency merged into your agency? _____ If so, does it have a separate agent#? _____

Purchase price of agency: _____ Date the book was transferred: _____

Amount financed: _____ Interest rate (APR) on the loan : _____

Monthly payment: _____ Number of months on the loan: _____

Collateral provided: _____

When was the agency established? _____ How long had the seller owned it? _____

Buyer's Affirmation: I hereby certify that the above information is true and correct to the best of my knowledge:

Signature: _____ **Date:** _____

About the Agency Being Purchased (Please complete this page for each agency being Purchased):

Owner's Name: _____

Legal Name of Agency: _____

Legal Form of Agency (corporation, dba, etc.): _____

Agency Address: _____
City State Zip

Current Rental Rate: \$_____ Term Remaining on Lease: _____

Do you plan to relocate the agency? _____ Anticipated agency relocation date: _____

Relocation Address: _____
City State Zip

Phone/E-mail: (____) (____)
Office Phone Office Fax

When was the agency established? _____ How long has the seller owned it? _____

Is there any debt on the agency? _____ What is the agency's selling price? _____

What is the owner's reason for selling? _____

How many licensed staff are employed at the agency? _____ How many unlicensed staff? _____

Does the seller's spouse or other relative work in the agency? _____

Please list all staff members being retained by buyer and their positions: _____

Anticipated takeover date: _____

Seller's Affirmation: I hereby certify that the above information is true and correct to the best of my knowledge:

Signature: _____ **Date:** _____

Buyer's Affirmation: I hereby certify that I have verified the above information to the best of my ability, and it is true and correct to the best of my knowledge:

Signature: _____ **Date:** _____