

## Agency Questionnaire & Agreement

*Once this document has been completed and signed, email it to [GMI-AgcyAppt@One80.com](mailto:GMI-AgcyAppt@One80.com)*

**How did you hear about us?**

Internet Referred By: \_\_\_\_\_  
Trade Show/Convention: \_\_\_\_\_ Other: \_\_\_\_\_

**Which GMI Programs are you interested in writing?**

Monoline Business Auto                      Auto Rental Fleet                      Contingent Auto Lease

**GENERAL INFORMATION**

Business Tax ID# \_\_\_\_\_ NPN# \_\_\_\_\_ Years in Business \_\_\_\_\_  
Business Type: Corporation Partnership Sole Proprietor LLC LLP Other: \_\_\_\_\_  
Agency Name \_\_\_\_\_  
DBA \_\_\_\_\_  
Website \_\_\_\_\_ General Email \_\_\_\_\_  
HQ Address: Street \_\_\_\_\_  
City, State, Zip \_\_\_\_\_  
Phone \_\_\_\_\_ Fax \_\_\_\_\_

*If you have multiple offices, please attach list showing full address of each, and indicate if Mailing and/or Billing address.*

Are you a member of any industry associations? No Yes (please list): \_\_\_\_\_

Which social media platforms does your agency post to? LinkedIn Facebook Instagram Twitter

**AGENCY PRODUCTION**

# of Agency Locations \_\_\_\_\_ # of Commercial Producers \_\_\_\_\_ # of Commercial CSRs \_\_\_\_\_  
What's your agency's total written premium? \$ \_\_\_\_\_ # of Commercial Lines Accounts \_\_\_\_\_  
What percentage is commercial lines? \_\_\_\_\_ % What percentage is personal lines? \_\_\_\_\_ %  
How many carriers do you write with? \_\_\_\_\_ How many carriers require a volume commitment? \_\_\_\_\_  
How many of your carriers write Standalone Commercial Auto? \_\_\_\_\_  
Does your agency specialize in a particular line of business or product? No Yes (please explain): \_\_\_\_\_

**Top 3 Current Commercial Lines Markets (Companies):**

	Company	Written Premium	Loss Ratio %
1			
2			
3			

Does your agency currently have premium placed with GMI through another agency, broker or aggregator?

No            Yes - total premium with other agency/broker/aggregator: \$ \_\_\_\_\_

**AGENCY LICENSING INFORMATION\***

Resident License State \_\_\_\_\_ Resident License Number \_\_\_\_\_

Non-Resident License State \_\_\_\_\_ Non-Resident License Number \_\_\_\_\_

Non-Resident License State \_\_\_\_\_ Non-Resident License Number \_\_\_\_\_

Who do we contact for updated license copies? Name \_\_\_\_\_

Email \_\_\_\_\_ Phone Number \_\_\_\_\_

*\* Please attach copies of all agency licenses for which you to plan to write business (no individual's licenses)*

**E&O COVERAGE INFORMATION\*\***

Carrier \_\_\_\_\_ Policy # \_\_\_\_\_

Expiration Date \_\_\_\_\_ Limits \_\_\_\_\_ Deductible \_\_\_\_\_

Who do we contact for updated E&O policy? Name \_\_\_\_\_

Email \_\_\_\_\_ Phone Number \_\_\_\_\_

*\*\*Please attach copy of E&O declaration page*

**AGENCY PERSONNEL**

**PRINCIPAL**

Name \_\_\_\_\_ Phone \_\_\_\_\_ Ext \_\_\_\_\_

Email \_\_\_\_\_ Mobile \_\_\_\_\_

**MARKETING MANAGER**

Name \_\_\_\_\_ Phone \_\_\_\_\_ Ext \_\_\_\_\_

Email \_\_\_\_\_ Mobile \_\_\_\_\_

**COMMERCIAL LINES MANAGER**

Name \_\_\_\_\_ Phone \_\_\_\_\_ Ext \_\_\_\_\_

Email \_\_\_\_\_ Mobile \_\_\_\_\_

**ACCOUNTING/BILLING**

Name \_\_\_\_\_ Phone \_\_\_\_\_ Ext \_\_\_\_\_

Email \_\_\_\_\_ Mobile \_\_\_\_\_

*\*\*If multiple locations, please attach an office directory listing full addresses, titles, phone #s / extensions, mobile #s, and email addresses for your commercial lines staff who may be sending submissions to us.*

**Agreement Number ( \_\_\_\_\_ )**  
*GMI USE ONLY*

**AGREEMENT** entered into this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_ by and between  
GMI Insurance Services (hereinafter, GMI), located at 99 Starr Street, Phoenixville, PA 19460 and Company

\_\_\_\_\_ DBA \_\_\_\_\_

(hereinafter, "Producer"), located at \_\_\_\_\_

**WHEREAS**, Producer wishes to place business through GMI for acceptance by admitted carriers in connection with programs administrated by GMI, in accordance with applicable laws and regulations; and

**WHEREAS**, GMI is willing to offer its facilities to brokers for placement of such insurance, all the forgoing in accordance with the laws and regulations pertaining thereto.

**NOW, THEREFORE**, in consideration of the mutual covenants and agreements hereinafter expressed, the parties hereto, intending to be legally bound, agrees as follows:

1. Producer warrants that it holds a Broker's license issued by the State of its domicile and all other licenses required to do business hereunder and intends to place business through GMI for acceptance by admitted carriers in compliance with the laws and regulations pertaining thereto regarding placement of business with admitted carriers.

Producer further warrants that any business which it shall submit to GMI involving persons or property situated in a state other than that of its domicile will, if accepted, be effected in accordance with the insurance laws and/or similar applicable laws of that State and Producer will indemnify GMI for any liability or loss arising as a result of GMI accepting any application submitted by Producer.

Producer shall be entitled to collect a commission on such business at a rate which shall be mutually agreed to between the parties at the time of placement of the business.

Producer shall not have authority to appoint other agents or sub-agents for purposes of this agreement and shall not do so, Producer shall have no authority to make and shall not make any agency appointments on behalf of GMI, nor shall Producer make any agreements rendering or purporting to make GMI liable for the payments and/or repayment of expenses, commissions, or any other sums.

If Producer is placing business with GMI that has been directed to it by another legally established insurance producer, Producer accepts full responsibility for that submission as if it were the originator of such placement.

2. It is further agreed by and between the parties that payment of premiums shall be made by Producer to GMI not later than 10 days after the effective date of the coverage, unless otherwise agreed to in writing. Failure to pay premiums as scheduled may result in cancellation of the subject policy. All premiums collected from the insured's which are to be paid to GMI shall be held by Producer in a fiduciary capacity in accordance with applicable law and should not be commingled with Broker's other funds.

Any payments to Producer under this Agreement shall be paid only to the extent permissible under applicable laws, rules and regulations. Producer shall have no right to such payment and GMI shall have no duty to make such payments in excess of those legally permissible.

GMI may, at its option, offset Broker's proportional share of any return premiums from any payments due Producer under this agreement.

3. Producer hereby guarantees the payment of all premiums due GMI on insurance bound or written hereunder, whether or not they are collected by Producer and whether or not they are financed.

4. Any credit extended to the insured or others shall be at the sole risk of the Producer and Producer guarantees that premium shall be paid to GMI by Producer when due.

5. Producer agrees to report immediately to GMI, or the designated claims administrator, any fact, occurrence or incident that may result in a loss or claim, together with full details thereof. Producer shall forward all documents and cooperate fully with GMI, or the designate claims administrator, in the investigation and adjustment of any claim, if requested.

6. Producer agrees to keep complete records and accounts of all transactions and to permit GMI to inspect all records pertaining to business transacted under this Agreement.

7. Producer agrees to maintain Error and Omissions coverage for itself and those for whom it is responsible, in the amount not less then \$1,000,000 throughout the term of this agreement with an insurer with a rating of A- or greater and shall provide GMI appropriate evidence of such insurance upon execution of this Agreement.

8. Producer shall not advertise in any way the name of GMI nor shall Producer advertise in any way the name of any company or underwriter represented by GMI without the prior written consent of GMI.

9. Each Party shall defend and indemnify the other against liability arising out of or in connection with this Agreement, including cost of defense and settlements, imposed on the party being so defended and indemnified for damages sustained and caused by negligent acts or omissions or willful misconduct of the other party, provided the party being so defended and indemnified has not caused or contributed to such liability by his own negligent acts or omissions or willful misconduct. The party being so defended and indemnified agrees, as a condition to such indemnification, to notify the other party of any claim or suit against him and, subject to the prior written consent of the party being so defended and indemnified, to allow the indemnifying and defending party to make such investigation, settlement or defense thereof as the indemnifying and defending party deems prudent.

Notwithstanding any provisions herein to the contrary, GMI, at its option, may affect the recovery of damages under this section 9 by offsetting such amounts against payments of amounts otherwise owing by it to Producer hereunder. Election of this remedy shall not be construed as exclusive, and shall not bar GMI from seeking any and all other remedies available at law or equity.

10. It is understood that Producer is an independent contractor and this Agreement does not permit Producer to bind GMI or any company or underwriter represented by GMI. Producer is not hereby the agent of GMI or any company or underwriter represented by GMI.

11. In the event of termination of this agreement, so long as the Producer has promptly accounted for and paid all premium for which it may be liable, the broker's records, and use and control of the expirations shall remain the property of the Producer and be left in its undisputed possession: otherwise, use of the records and control of the expirations shall be vested exclusively in GMI.

12. This agreement shall become effective when accepted by GMI and supersedes all previous agreements, whether written or oral. This agreement may be terminated by either party at any time upon giving of written notice of termination, but such termination shall not alter in any way the continued application of this Agreement to policies in effect as of the date of such termination and Producer shall complete the collections of premiums and continue to provide claims support and service on all policies in effect at termination.

13. This agreement constitutes the entire and exclusive understanding between the parties with respect to its subject matter and is to be construed in accordance with and governed by the Commonwealth of Pennsylvania.

14. This agreement may not be assigned by Producer without the written consent of GMI.



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www.GMI-Insurance.com

15. This Agreement shall be binding upon and adhere to the benefit of the parties hereto, their respective heir, successors and assignees.

16. No failure of either party to insist on strict compliance with this Agreement or to exercise any right under it shall be a waiver of such right.

17. This Agreement may be amended, but then only in a written addendum to this Agreement executed by the parties

18. All exhibits and schedules hereto shall be deemed a part hereof.

**IN WITNESS WHEREOF**, the parties have hereto executed this agreement as of the day and year set forth above.

Signed By \_\_\_\_\_ Title \_\_\_\_\_

Signature \_\_\_\_\_

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

*\* Please attach a completed, signed and dated W-9 form (2024 version)*

## GMI Insurance Services, a division of One80 Intermediaries

Signed By \_\_\_\_\_ Title \_\_\_\_\_

Signature \_\_\_\_\_

Date Appointed \_\_\_\_\_