

Company Overview

- ☐ Company Description
- ☐ Domiciled State
- ☐ Historical Summary
- ☐ Key Personnel & Management
- ☐ Program Overview
- ☐ Projected Growth



Financials

- ☐ 2-Year Annual Statements
- ☐ 5-Year Company Surplus
- ☐ AM Best/Demotech Rating (if available)



Premium

- ☐ 10-Year Historical Premium
- ☐ 10-Year Rate Change History
- ☐ 2-Year Premium by State
- ☐ Premium by Line of Business
- ☐ Primary Rates
- ☐ Property and Casualty Breakdown



Losses

- ☐ 10-15 Years Loss Experience
- ☐ Detailed Description of Large Losses
- ☐ Loss Analysis by Line of Business



Contracts

- ☐ Draft Wording



Underwriting

- ☐ 5-Year Underwriting Changes
- ☐ Agent/Broker Commission
- ☐ Current Policy Forms
- ☐ Current Underwriting Guidelines
- ☐ Deductible Profile
- ☐ Endorsements
- ☐ Inflations Guard
- ☐ Loss Evaluation (ACV vs. RCV)
- ☐ Major Risks Mitigation Strategies (Hurricanes, Wildfires, Etc.)
- ☐ Rate Changes
- ☐ Staff Experience
- ☐ Strategic Plan



Claims

- ☐ Experience by Class of Business
- ☐ Large Loss Strategy
- ☐ Procedures
- ☐ Staff Experience



Exposure

- ☐ 2-Year Casualty Limits Profiles
- ☐ 2-Year Property Limits Profiles
- ☐ IIF by County (Unicoded if Available)
- ☐ IIF by State
- ☐ Modeled PMLS



Contact: **Rob Martin**, rob@agbrokeragesolutions.com | **515-724-5087**
or visit AgBrokerageSolutions.com for more information