



The Brokers Link to the Finest Wholesale Markets

80 Crossways Park Drive, Suite # 210  
Woodbury, NY 11797  
Main Line: (631) 421-9355  
Fax: (631) 421-5977  
[www.jlnygroup.com](http://www.jlnygroup.com)

**BROKER QUESTIONNAIRE**

Agency Name: \_\_\_\_\_

DBA: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Telephone: \_\_\_\_\_

Fax: \_\_\_\_\_

Email: \_\_\_\_\_

No. of Years in Business: \_\_\_\_\_

Website: \_\_\_\_\_

No. of Employees: \_\_\_\_\_

SS# / Tax ID: \_\_\_\_\_

Independent  or Captive Agent: \_\_\_\_\_

**Names & addresses of all persons having ownership interest in agency**

Owner # 1: \_\_\_\_\_

Owner # 2: \_\_\_\_\_

Address: \_\_\_\_\_

Address: \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Email: \_\_\_\_\_

Email: \_\_\_\_\_

**Please list your direct Carriers & other Wholesalers you place business with in order of premium volume**

Direct Carrier: \_\_\_\_\_ Yrs. \_\_\_\_\_ Wholesaler: \_\_\_\_\_ Yrs. \_\_\_\_\_

Direct Carrier: \_\_\_\_\_ Yrs. \_\_\_\_\_ Wholesaler: \_\_\_\_\_ Yrs. \_\_\_\_\_

Direct Carrier: \_\_\_\_\_ Yrs. \_\_\_\_\_ Wholesaler: \_\_\_\_\_ Yrs. \_\_\_\_\_

Direct Carrier: \_\_\_\_\_ Yrs. \_\_\_\_\_ Wholesaler: \_\_\_\_\_ Yrs. \_\_\_\_\_



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**How did you hear about us?**

Tradeshaw  Which one? \_\_\_\_\_

Email Ad  Which one? \_\_\_\_\_

Referral  Referred by \_\_\_\_\_

**What Carriers and Products are you approaching us for?**

JLNY Commercial Carrier(s): \_\_\_\_\_

JLNY Commerical Products: \_\_\_\_\_

JLNY Personal Carrier(s): \_\_\_\_\_

JLNY Personal Products: \_\_\_\_\_

**What is your 3 year loss ratio?**

Commercial Lines: \_\_\_\_\_ Personal Lines: \_\_\_\_\_

Commercial Lines: \_\_\_\_\_ Personal Lines: \_\_\_\_\_

Commercial Lines: \_\_\_\_\_ Personal Lines: \_\_\_\_\_

**Have any E&O Claims been made in the past 5 years against your Agency officers, partners or owners? Yes  No**

If yes, please provide details:

\_\_\_\_\_  
\_\_\_\_\_

It is agreed that the statements on this form or any material submitted herewith are a true and accurate representation of the applicant and they shall be deemed material to the acceptance of the risk(s) from JLNY Group LLC. and acceptance is done in reliance upon the truth of said representation.

I have read and agree to the terms and conditions of the above questionnaire.

\_\_\_\_\_  
Signature & Title \_\_\_\_/\_\_\_\_/\_\_\_\_  
Date