



POTENTIAL AGENT SCREENING QUESTIONS

1. Full Legal Name of Agency: _____
2. Physical address of agency: _____
3. Phone Number: _____ Fax Number: _____ E-Mail: _____
4. Agency Principal: _____ Personal Lines Manager: _____
5. New Customer Acquisition Strategies/Tactics:
 - Mailers, Advertising? – Results? _____

 - Partnerships with other business for purposes of securing new business? (Mortgage brokers, Accountants, Real estate Agents): _____

6. How many NEW Personal Lines quotes per week? _____
7. How many NEW Personal Lines policies written per week?: _____
8. Annual New Business Goals for your Agency: _____
9. How Many homes with a replacement cost of \$500,000 or greater quoted weekly?: _____
10. Any existing business with Chubb through MGA? If yes, please provide written premium amount and the name of the MGA:

11. How long has agency been in business? _____
12. Other major carriers represented: _____
13. Office staff - # of Personal Lines CSR: _____
14. Any current accounts that you would be able to quote with Chubb? _____
15. Who is the top PL client in your office? – What is their AP and would you be willing to quote it with Chubb? _____
