

# LOCALEDGE

## AGENCY APPLICATION & PROFILE

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

Principal/Owner/CEO: \_\_\_\_\_

NPN: \_\_\_\_\_

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

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

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

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

Office Phone: \_\_\_\_\_ Ext: \_\_\_\_\_ Fax: \_\_\_\_\_

Business Type:     ☐ Sole Proprietorship     ☐ Partnership     ☐ Corporation

Are you affiliated with a distribution organization (i.e. network, alliance or cluster)? ☐ Yes ☐ No

Name: \_\_\_\_\_ Year Joined: \_\_\_\_\_

Do you maintain Employee Dishonest coverage for all Officers and Employees? ☐ Yes ☐ No

Do you maintain Errors & Omissions coverage?     ☐ Yes ☐ No

Have you or any officer, director, or other principal in your organization ever had an insurance license suspended or terminated for any reason, or ever been subject to any disciplinary action? ☐ Yes ☐ No

If Yes, please explain: \_\_\_\_\_

Will all your businesses or persons selling under this agreement do so through the licensed entity that is party to this agreement?     ☐ Yes ☐ No

Is there any pending or threatened litigation or judgements within the past five years exceeding \$10,000 against the broker or any principals of the organization?     ☐ Yes ☐ No

If Yes, please explain: \_\_\_\_\_

**LocalEdge**

2270 Camino Vida Roble Suite M, Carlsbad, CA 92011 | 800.444.1744

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## Personnel:

### Count of Staff by Type

\_\_\_\_\_ Principals / Owners  
\_\_\_\_\_ Producers (Salespeople)  
\_\_\_\_\_ Other Licensed Employees  
\_\_\_\_\_ Non-Licensed Employees

Accounting Contact: \_\_\_\_\_

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

Phone Number: \_\_\_\_\_

## Total Agency Premium Current Year:

\$ \_\_\_\_\_

\_\_\_\_\_ % Commercial Lines

\_\_\_\_\_ % Personal Lines

\_\_\_\_\_ % Brokerage

Please list your top 3 wholesale brokers:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

What type(s) of business do you broker?

We would like to provide you more information about LocalEdge. What would you be most interested in learning more about?

- ☐ Personal Lines    ☐ High Value Home    ☐ Coastal Solutions    ☐ Direct Access  
☐ Small Commercial    ☐ Excess & Surplus    ☐ Middle Market    ☐ Commercial Specialty

**\*\*Please return completed documents to [localedgesalesteam@bridgespecialty.com](mailto:localedgesalesteam@bridgespecialty.com)\*\***

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