



Trinity E & S Insurance Services, Inc.
 79-301 Country Club Drive, Suite 200 • Bermuda Dunes, CA 92201
 Phone: 800-244-6496 • Fax: 877-999-2990
 CA Lic # 0691040
www.TrinityInsurance.com

CONFIDENTIAL BROKER/AGENCY QUESTIONNAIRE

New Appointment Request Previously Appointed with Trinity

A. Contact Information

Exact Legal Name of Firm:

Physical Address:

Mailing/Billing Address:

Phone Number:

Fax Number:

Branch Offices:

Web-site:

Agency Contacts				
Title	Name	Email	Phone/extension	Comments
Owner/Principal				
Accounting				
Marketing/Placements				

B. Business Structure

Business Type: Retail Agent Managing General Agent Wholesale Broker

Form of Business: Sole Proprietor Partnership Corporation

Year Established: All other business names / DBA(s):

Any mergers or acquisitions within the last 3 years. yes no Details:

C. Regulatory & Compliance

FEIN or Social Security Number:

Errors & Omissions Carrier:

Coverage Limits:

Expiration Date:

In the last 10 years, has your firm or any principal of your firm:

Filed for bankruptcy? yes no

Had an E&O claim? yes no

Undergone regulatory or criminal proceedings? yes no

Please explain any "yes" answer:

License Information

State	Licensed	License #	Expiration Date	Comments
Arizona	<input type="checkbox"/>			
California	<input type="checkbox"/>			
Nevada	<input type="checkbox"/>			

Submit current copies of these state licenses (Resident or Non-Resident Agent/Broker) -.

How did you hear about Trinity?

Additional Comments:

Signature: _____

Date:

Print Name:

Title:

Check List – Please submit copies of:

License(s)

E & O Dec Page

W-9

FAX completed questionnaire to: 877-999-2990