

# MJ KELLY COMPANY INSURANCE BROKERS

Full Company Name \_\_\_\_\_

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

Physical Address \_\_\_\_\_ E-Mail \_\_\_\_\_

Accounting Contact for Statements \_\_\_\_\_ E-Mail \_\_\_\_\_

Phone # ( \_\_\_\_\_ ) \_\_\_\_\_ Fax # ( \_\_\_\_\_ ) \_\_\_\_\_ Tax ID # \_\_\_\_\_

Corporation    Sole Proprietor    Partnership    LLC

Principal's Full Name \_\_\_\_\_

Address \_\_\_\_\_

Phone# ( \_\_\_\_\_ ) \_\_\_\_\_

Social Security # \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_    Date of Birth \_\_\_\_\_

Current Carriers Represented \_\_\_\_\_

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

Current Brokers Used \_\_\_\_\_

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

Past Brokers Used \_\_\_\_\_

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

Total Premium Volume \$ \_\_\_\_\_

Anticipated Volume with MJ Kelly \$ \_\_\_\_\_

E&O Carrier & Limits \_\_\_\_\_ E&O Policy #: \_\_\_\_\_

Any Past E&O Claims? No Yes

Bank References \_\_\_\_\_

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

Three (3) Credit References \_\_\_\_\_

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

Why are you interested in MJ Kelly Company? \_\_\_\_\_

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