



Date ____/____/20____

Agency Information:

Agency Name: _____

Physical Address: _____

Mailing Address: _____

Branch Office Address/Addresses: _____

Phone Number: _____

Fax Number: _____

Web Address: _____

Agency Principal: _____

Agency Principal's Email Address: _____

Agency Primary Contact: _____

Primary Contact's Email Address: _____

Years in Business: _____

Agency Social Media:

Agency Facebook Page: _____

Agency Twitter Profile: _____

Agency LinkedIn Company Page: _____

Tell us more about your agency:

Lines of Business Written: _____

Total Agency Volume: _____

Mix of Business: _____% Personal Lines _____% Workers' Compensation

Does your agency specialize in a certain line of business/niche? _____

Which carriers are you contracted direct:

Personal Lines: _____

Workers' Compensation: _____

Which wholesale brokers are you working with?

Personal Lines: _____

Workers' Compensation: _____

Please provide a copy of the following agency documents for our records:

- Agency Principal's Insurance License
- Agency State License
- Agency's E & O Dec Page
- A current list of agency employees (Please include work email addresses & phone numbers)

Additional Required Documents:

- Risk Innovation's Broker Agreement
- W-9
- ACH Form/Authorization Agreement for Agency Commission Direct Deposit (please include a voided check)

Please return to:
Attn: Marketing Department
Risk Innovations, LLC
marketing@riskinnovations.com
7000 Central Parkway,
Suite 1100
Atlanta, GA 30328
1 (800) 913-6696

Risk Innovations is an independently owned and operated multi-lines wholesaler that caters to the needs of independent insurance agencies. Founded in 2002, Risk Innovations continues to expand its operations and currently has offices in Atlanta, GA, Kansas City, MO, Charlotte, NC and Chicago, IL. We specialize in Workers' Compensation and High Value Personal Lines Insurance to meet the needs of your most affluent clientèle. At Risk Innovations our philosophy is simple: offer exceptional products and services to our valued agency partners.