**COMPANY NAME:**

**LOGO:**

**BACKGROUND INFORMATION:**

**Address:**

**Phone Number:**

**Website:**

**Senior Executive:**

**Department Manager:**

**In Force Policy Count by Line of Business:**

 **Farmowners:**

 **Commercial:**

 **Homeowner:**

 **Personal auto:**

**Top 3 Lines of Business by Premium Volume:**

|  |  |
| --- | --- |
| **Line of Business**  | **Direct Written Premium**  |
|  |  |

**Agency Force Size:**

**DEPARTMENT STRUCTURE:**

**Number of employees:**

**Areas of Responsibility:**

**Functional Units/Sections:**

**TOP PROJECTS/ INITIATIVES:**

**Current Year**

**Next Year**

**PROCESSING SYSTEMS/EQUIPMENT**

|  |  |  |
| --- | --- | --- |
| **System/Equipment** | **Function**  | **Lines of Business**  |
|  |  |  |
|  |  |  |
|  |  |  |