



3250 Interstate Drive, Richfield, Ohio 44286-9000 | 800-929-1500 | Fax: 330-659-8905 | www.natl.com

National Interstate Insurance Company National Interstate Insurance Company HI Triumphe Casualty Company Vanliner Insurance Company

PROSPECTIVE PRODUCER PROFILE

****To be completed and submitted to write business with National Interstate****

AGENCY PROFILE

Date: _____

Agency Name: _____

DBA: _____
If different than Agency Name

Type of Agency: Individual Partnership Corporation Limited Corporation Joint Venture

Principal Address: _____

City: _____ State: _____ Zip: _____

Mailing Address: _____
If different than Principal Address

City: _____ State: _____ Zip: _____

Telephone: _____ **Fax:** _____

Email: _____ **Website:** _____

FEIN/SSN: _____ **Year Agency Est:** _____

If you have multiple offices, please list all locations.

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ACTIVE PRINCIPALS

Name	Title	Years in Insurance	% Ownership
			%
			%
			%
			%
			%

Do you conduct business as a Retail Agent? Yes No

Do you conduct business as a Wholesale Agent? Yes No

Do you conduct business other than insurance? *If yes, please explain:* Yes No

Do you specialize in any type of insurance? *If yes, please describe:*

Is your agency familiar with Captives?

If yes, please list all available captive programs available to your agency:

ERRORS & OMISSIONS INFORMATION

Do you currently have Errors & Omissions Coverage? Yes No

Coverage Limit: \$ _____

*Please attach copy of current E&O Declarations page. *Minimum requirements based on product.*

Has any insurance company ever refused to write, cancelled, or otherwise withdrawn E&O coverage for the agency, or any of its principals or producers?

If yes, please explain:

Has any member of your agency been the subject of any disciplinary hearing by a state insurance department, federal securities agency or other regulatory authority?

If yes, please explain:

Is there now pending or threatened, or has there been in the past five years, any litigation, arbitration decision or judgment against the agency principals or producers exceeding \$10,000?

If yes, please explain:

LICENSURE INFORMATION

States in which the agency is currently licensed to do business *(or attach a separate sheet with this information)*

State	Agent License #	Broker License #

Do you hold a Surplus Lines License? Yes No

If yes, please list states and licensing information below:

State	Agent License #	Broker License #

LICENSURE INFORMATION - continued

Do you have any Sub-agent or other producer relationships?

Yes No

If yes, please list below:

Name	Title	Years In Insurance

NAME & TITLE OF PERSON COMPLETING THIS AGENCY PROFILE

The undersigned hereby declares that the answers given to the foregoing questions are true, complete and accurate and that the answers contain no misrepresentations, omissions, or other concealment fact.

Name _____ Title _____

Authorized Signature _____ Date _____

Before submitting, please complete the business profiles on pages 4 - 9, as applicable, and attach the following:

- Agency and Producer Licenses
- E&O Declarations Page

FOR OFFICE USE ONLY

Broker Code Assigned _____
Date Entered _____
Initials _____
Agency File Created _____

BUSINESS PROFILES

Please check all the types of business you currently write and complete the corresponding sections, below:

- Passenger Transportation (i.e. Charter Bus, School, Transit, Limousine)
- Community Medical / Non-Emergency Transportation
- Tow Truck / Collateral Recovery
- Crane & Rigging and Specialized Carriers
- Truck Transportation (Excluding Tow)
- Waste Operations
- LP Operations
- Ambulance
- Excess Liability Coverage

Please describe any other niche/specialty or program business your agency writes with volume of \$500,000 or more:

Carrier Relationships Discontinued / Cancelled Over the Last 5 Years	Reason

PASSENGER TRANSPORTATION PROFILE

Total Current Passenger Transportation Premium: \$ _____

List All Markets in Order of Volume	Annual Volume	Commission % Received	States Represented	% of Premium Volume	Commission % Received
	\$	%		%	%
	\$	%		%	%
	\$	%		%	%
	\$	%		%	%

Mix of Business by Risk Type	% of Premium Volume	Number of accounts with annual premium of \$75K+ that may be eligible for our Rental Captive Programs
Charter Bus	%	
School Bus	%	
Transit	%	
Limousine	%	
Mixed Fleet	%	
Other:	%	

How do you plan to use National Interstate as a market?	
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PRODUCTION TO COMPANY	
Anticipated premium volume to National Interstate	
Source	Premium Volume
New Business	\$
Transfer from Current Company	\$
Transfer from Discontinued Company	\$
Other:	\$

Comments:

COMMUNITY MEDICAL / NON-EMERGENCY TRANSPORTATION PROFILE

Total Current Community Medical Transportation Premium: \$ _____

List All Markets in Order of Volume	Annual Volume	Commission % Received	States Represented	% of Premium Volume	Commission % Received
	\$	%		%	%
	\$	%		%	%
	\$	%		%	%
	\$	%		%	%

How do you plan to use National Interstate as a market?

PRODUCTION TO COMPANY	
Anticipated premium volume to National Interstate	
Source	Premium Volume
New Business	\$
Transfer from Current Company	\$
Transfer from Discontinued Company	\$
Other:	\$

Comments:

TOW / COLLATERAL RECOVERY PROFILE

List All Markets in Order of Volume	Annual Volume	Commission % Received	States Represented	% of Premium Volume	Commission % Received
	\$	%		%	%
	\$	%		%	%
	\$	%		%	%
	\$	%		%	%

% of volume that is towing operations _____ %

% of volume that is auto hauler (<4 units) _____ %

% of volume that is professional collateral recovery _____ %

 % of voluntary repo (average across book) _____ %

 % of involuntary repo (average across book) _____ %

Average revenue generated from repair/service operations \$ _____

Total number of tow accounts written _____

Total number of auto hauler accounts written _____

Total number of professional collateral recovery accounts written _____

Premium Volume by Fleet Size	1-9 Units	10-39 Units	40+ Units	Total Agency Premium
Projection	\$	\$	\$	\$
Current Year	\$	\$	\$	\$

How do you plan to use National Interstate as a market?

TOW / COLLATERAL RECOVERY PROFILE - continued

PRODUCTION TO COMPANY	
Anticipated premium volume to National Interstate	
Source	Premium Volume
New Business	\$
Transfer from Current Company	\$
Transfer from Discontinued Company	\$
Other:	\$

Comments:

CRANE & RIGGING AND SPECIALIZED CARRIERS PROFILE

List All Markets in Order of Volume	Annual Volume	Commission % Received
	\$	%
	\$	%
	\$	%
	\$	%

States Represented	% of Premium Volume	Commission % Received
	%	%
	%	%
	%	%
	%	%

Total number of tow accounts written _____

Average premium size of accounts (with Workers' Comp) \$ _____

Average premium size of accounts (without Workers' Comp) \$ _____

Premium Volume by Fleet Size	1-5 Units	6-10 Units	11-20 Units	21-40 Units	41+ Units	Total Agency Premium
Projection	\$	\$	\$	\$	\$	\$
Current Year	\$	\$	\$	\$	\$	\$

Mix of Business by Risk Type	% of Premium Volume
Crane	%
Heavy Haul/Specialized Carriers	%

How do you plan to use National Interstate as a market?	
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PRODUCTION TO COMPANY	
Anticipated premium volume to National Interstate	
Source	Premium Volume
New Business	\$
Transfer from Current Company	\$
Transfer from Discontinued Company	\$
Other:	\$

Comments:

TRUCK TRANSPORTATION PROFILE

List All Markets in Order of Volume	Annual Volume	Commission % Received
	\$	%
	\$	%
	\$	%
	\$	%

States Represented	% of Premium Volume	Commission % Received
	%	%
	%	%
	%	%
	%	%

% of truck volume that is local/intermediate operations
(under 500 miles in radius)

_____ %

Total number of truck accounts written

Average premium size of accounts

\$ _____

Premium Volume by Fleet Size	1-10 Units	11-20 Units	21+ Units	Total Agency Premium
Projection	\$	\$	\$	\$
Current Year	\$	\$	\$	\$

Mix of Business by Risk Type	% of Premium Volume	Number of accounts with 40+ units that may be eligible for our Rental Captive Programs
Less than Truckload (LTL)	%	
Tankers	%	
Truckload	%	
Local Cartage (Pickup/Delivery)	%	
Heavy Haulers	%	
Auto Haulers	%	
Intermodal	%	
Flatbed, Sand & Gravel, Dump	%	

How do you plan to use National Interstate as a market?	
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PRODUCTION TO COMPANY	
Anticipated premium volume to National Interstate	
Source	Premium Volume
New Business	\$
Transfer from Current Company	\$
Transfer from Discontinued Company	\$
Other:	\$

Comments:

WASTE OPERATIONS PROFILE

List All Markets in Order of Volume	Annual Volume	Commission % Received
	\$	%
	\$	%
	\$	%
	\$	%

States Represented	% of Premium Volume	Commission % Received
	%	%
	%	%
	%	%
	%	%

% of volume that are waste operations _____ %
 Total number of waste operation accounts written _____
 Average premium size of accounts \$ _____

Premium Volume by Fleet Size	1-4 Units	5-50 Units	51+ Units	Total Agency Premium
Projection	\$	\$	\$	\$
Current Year	\$	\$	\$	\$

Mix of Business by Risk Type	% of Premium Volume	Number of accounts with 40+ units that may be eligible for our Rental Captive Programs
Residential Waste Hauler	%	
Commercial Waste Hauler	%	
Liquid Waste	%	
Recycling Operations	%	
Construction & Demolition Debris Removal	%	
Landfill	%	
Other:	%	

How do you plan to use National Interstate as a market?	
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PRODUCTION TO COMPANY	
Anticipated premium volume to National Interstate	
Source	Premium Volume
New Business	\$
Transfer from Current Company	\$
Transfer from Discontinued Company	\$
Other:	\$

Comments:

LP OPERATIONS PROFILE

List All Markets in Order of Volume	Annual Volume	Commission % Received
	\$	%
	\$	%
	\$	%
	\$	%

States Represented	% of Premium Volume	Commission % Received
	%	%
	%	%
	%	%
	%	%

% of agency's book that consists of LP Operations _____ %

Total number of LP accounts written _____

Average premium size of accounts \$ _____

Premium Volume by Fleet Size	1-9 Units	10-39 Units	40+ Units	Total Agency Premium
Projection	\$	\$	\$	\$
Current Year	\$	\$	\$	\$

How do you plan to use National Interstate as a market?	
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PRODUCTION TO COMPANY	
Anticipated premium volume to National Interstate	
Source	Premium Volume
New Business	\$
Transfer from Current Company	\$
Transfer from Discontinued Company	\$
Other:	\$

Comments:

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AMBULANCE PROFILE

Total Current Ambulance Premium: \$ _____

List All Markets in Order of Volume	Annual Volume	Commission % Received
	\$	%
	\$	%
	\$	%
	\$	%

States Represented	% of Premium Volume	Commission % Received
	%	%
	%	%
	%	%
	%	%

Premium Volume by Fleet Size	1-9 Units	10-39 Units	40+ Units	Total Agency Premium
Projection	\$	\$	\$	\$
Current Year	\$	\$	\$	\$

How do you plan to use National Interstate as a market?

PRODUCTION TO COMPANY	
Anticipated premium volume to National Interstate	
Source	Premium Volume
New Business	\$
Transfer from Current Company	\$
Transfer from Discontinued Company	\$
Other:	\$

Comments:

EXCESS LIABILITY COVERAGE PROFILE

List All Markets in Order of Volume	Annual Volume	Commission % Received
	\$	%
	\$	%
	\$	%
	\$	%

States Represented	% of Premium Volume	Commission % Received
	%	%
	%	%
	%	%
	%	%

Total number of accounts carrying excess coverage _____

Average premium size of accounts \$ _____

How do you plan to use National Interstate as a market?

PRODUCTION TO COMPANY	
Anticipated premium volume to National Interstate	
Source	Premium Volume
New Business	\$
Transfer from Current Company	\$
Transfer from Discontinued Company	\$
Other:	\$

Comments: