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Fax 949.362.9211

95 Enterprise, Suite 370  
Aliso Viejo, CA 92656

[www.thegdgroup.com](http://www.thegdgroup.com)

## G&D Client Profile

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Insurance Agency Name:

Primary Contact:

Address:

Phone # :

Fax # :

Cell# :

E-mail address:

Website:

Other Producer Names going out on appointments:

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1-#What insurance companies does your agency represent?

2-#Do you provide all lines of P&C insurance?

3-#Do you provide all lines of Benefits Insurance?

4-#What class of businesses do your insurance companies have special programs for?

5-#Do you have any programs that separate you from the competition? (assn. endorsements, etc....)

6-#In 3 or 4 sentences, what separates your agency from the competition?

7-#Who is the competition in your area & how do you spell their agency names?



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8-# Do you have any clients that we can use to drop names (if needed) for any industry?

9-# How many offices does your agency have?

10-# How many employees does your agency have?

11-# How long have you been in business?

12-# Appt.'s are set 1-2 weeks in advance. Are there any days & times that you don't want us to set appt.'s on?

13-# Is there a minimum employee size you require for P&C appt.'s?

14-# Is there a minimum employee size you require for Benefits appt.'s?

15-# Are you interested in Off-Season Appointments, which are appt.'s set outside of 60-120 days prior to the renewal date to meet briefly with your prospects & help build the relationship early on?  
(Normal appt.'s will always be set & these are set typically 60-120 prior to the renewal)

16-# Is there anything else we should know?  
(Insurance Companies you can't compete with, extra questions you would like us ask, etc..)

17-# What would you like your Password to be for the G&D client portal?

User ID: (this will automatically be your e-mail address)

Password: (this is up to you & up to 8 characters)