

# McGowan, Donnelly & Oberheu, LLC

106 E. 6<sup>th</sup> Street, Suite 520 • Austin, TX 78701 • P: 512.600.2280 • F: 440.333.3214

## Broker Questionnaire

Please complete this "Broker Questionnaire" and fax or e-mail it back to us. We require this form in order to begin working with your firm (or, if you are a current broker, to update our records and continue working with your firm).

**Please Fax or E-Mail This Form To:** Heather Hysong– Broker Relations Department  
Fax: 440.333.3214  
E-Mail: [hhysong@mcgowanins.com](mailto:hhysong@mcgowanins.com)

**Brokerage Name:** \_\_\_\_\_

**Brokerage Mailing Address:** \_\_\_\_\_  
(Main Office) \_\_\_\_\_

**Brokerage Physical Address:** \_\_\_\_\_  
(Main Office) \_\_\_\_\_

**Brokerage Phone:** (\_\_\_\_) \_\_\_\_ - \_\_\_\_ (Main Office)

**Brokerage Fax:** (\_\_\_\_) \_\_\_\_ - \_\_\_\_ (Main Office)

**E&O Carrier:** \_\_\_\_\_

**E&O Policy Term:** \_\_\_\_/\_\_\_\_/20\_\_ - \_\_\_\_/\_\_\_\_/20\_\_

**E&O Limits:** \$\_\_\_\_\_ Per Occurrence / \$\_\_\_\_\_ Annual Aggregate

**Line of Business in Which Brokerage Specializes:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

# Office Location #1 (Main Office or Administrative Office)

**Address:** \_\_\_\_\_  
\_\_\_\_\_

Phone: ( ) \_\_\_\_\_ - \_\_\_\_\_  
Fax: ( ) \_\_\_\_\_ - \_\_\_\_\_

## **Staff:**

(1) Head of Organization: \_\_\_\_\_ Title: \_\_\_\_\_  
(Ex.- President or Mng. Partner)

Direct Line: ( ) \_\_\_\_\_ - \_\_\_\_\_ Direct Fax: ( ) \_\_\_\_\_ - \_\_\_\_\_  
Phone Extension: x \_\_\_\_\_ E-Mail: \_\_\_\_\_

(2) Marketing Manager: \_\_\_\_\_  
Direct Line: ( ) \_\_\_\_\_ - \_\_\_\_\_ Direct Fax: ( ) \_\_\_\_\_ - \_\_\_\_\_  
Phone Extension: x \_\_\_\_\_ E-Mail: \_\_\_\_\_

(3) Commercial Lines Manager: \_\_\_\_\_  
Direct Line: ( ) \_\_\_\_\_ - \_\_\_\_\_ Direct Fax: ( ) \_\_\_\_\_ - \_\_\_\_\_  
Phone Extension: x \_\_\_\_\_ E-Mail: \_\_\_\_\_

(4) Accounting Contact: \_\_\_\_\_ Position: \_\_\_\_\_  
Direct Line: ( ) \_\_\_\_\_ - \_\_\_\_\_ Direct Fax: ( ) \_\_\_\_\_ - \_\_\_\_\_  
Phone Extension: x \_\_\_\_\_ E-Mail: \_\_\_\_\_

(5) Producer #1: \_\_\_\_\_ Position: \_\_\_\_\_  
Direct Line: ( ) \_\_\_\_\_ - \_\_\_\_\_ Direct Fax: ( ) \_\_\_\_\_ - \_\_\_\_\_  
Phone Extension: x \_\_\_\_\_ E-Mail: \_\_\_\_\_

(6) Producer #2: \_\_\_\_\_ Position: \_\_\_\_\_  
Direct Line: ( ) \_\_\_\_\_ - \_\_\_\_\_ Direct Fax: ( ) \_\_\_\_\_ - \_\_\_\_\_  
Phone Extension: x \_\_\_\_\_ E-Mail: \_\_\_\_\_

(7) Producer #3: \_\_\_\_\_ Position: \_\_\_\_\_  
Direct Line: ( ) \_\_\_\_\_ - \_\_\_\_\_ Direct Fax: ( ) \_\_\_\_\_ - \_\_\_\_\_  
Phone Extension: x \_\_\_\_\_ E-Mail: \_\_\_\_\_

(8) CSR #1: \_\_\_\_\_ Position: \_\_\_\_\_  
Direct Line: ( ) \_\_\_\_\_ - \_\_\_\_\_ Direct Fax: ( ) \_\_\_\_\_ - \_\_\_\_\_  
Phone Extension: x \_\_\_\_\_ E-Mail: \_\_\_\_\_

(9) CSR #2: \_\_\_\_\_ Position: \_\_\_\_\_  
Direct Line: ( ) \_\_\_\_\_ - \_\_\_\_\_ Direct Fax: ( ) \_\_\_\_\_ - \_\_\_\_\_  
Phone Extension: x \_\_\_\_\_ E-Mail: \_\_\_\_\_

(10) CSR #3: \_\_\_\_\_ Position: \_\_\_\_\_  
Direct Line: ( ) \_\_\_\_\_ - \_\_\_\_\_ Direct Fax: ( ) \_\_\_\_\_ - \_\_\_\_\_  
Phone Extension: x \_\_\_\_\_ E-Mail: \_\_\_\_\_

**Office Location #: \_\_\_\_\_ (Satellite Office)**

**Address:** \_\_\_\_\_  
\_\_\_\_\_

Phone: ( ) \_\_\_\_\_ - \_\_\_\_\_  
Fax: ( ) \_\_\_\_\_ - \_\_\_\_\_

**Staff:**

(1) Branch Manager: \_\_\_\_\_ Title: \_\_\_\_\_  
Direct Line: ( ) \_\_\_\_\_ - \_\_\_\_\_ Direct Fax: ( ) \_\_\_\_\_ - \_\_\_\_\_  
Phone Extension: x \_\_\_\_\_ E-Mail: \_\_\_\_\_

(2) Marketing Manager: \_\_\_\_\_  
Direct Line: ( ) \_\_\_\_\_ - \_\_\_\_\_ Direct Fax: ( ) \_\_\_\_\_ - \_\_\_\_\_  
Phone Extension: x \_\_\_\_\_ E-Mail: \_\_\_\_\_

(3) Commercial Lines Manager: \_\_\_\_\_  
Direct Line: ( ) \_\_\_\_\_ - \_\_\_\_\_ Direct Fax: ( ) \_\_\_\_\_ - \_\_\_\_\_  
Phone Extension: x \_\_\_\_\_ E-Mail: \_\_\_\_\_

(4) Accounting Contact: \_\_\_\_\_ Position: \_\_\_\_\_  
Direct Line: ( ) \_\_\_\_\_ - \_\_\_\_\_ Direct Fax: ( ) \_\_\_\_\_ - \_\_\_\_\_  
Phone Extension: x \_\_\_\_\_ E-Mail: \_\_\_\_\_

(5) Producer #1: \_\_\_\_\_ Position: \_\_\_\_\_  
Direct Line: ( ) \_\_\_\_\_ - \_\_\_\_\_ Direct Fax: ( ) \_\_\_\_\_ - \_\_\_\_\_  
Phone Extension: x \_\_\_\_\_ E-Mail: \_\_\_\_\_

(6) Producer #2: \_\_\_\_\_ Position: \_\_\_\_\_  
Direct Line: ( ) \_\_\_\_\_ - \_\_\_\_\_ Direct Fax: ( ) \_\_\_\_\_ - \_\_\_\_\_  
Phone Extension: x \_\_\_\_\_ E-Mail: \_\_\_\_\_

(7) Producer #3: \_\_\_\_\_ Position: \_\_\_\_\_  
Direct Line: ( ) \_\_\_\_\_ - \_\_\_\_\_ Direct Fax: ( ) \_\_\_\_\_ - \_\_\_\_\_  
Phone Extension: x \_\_\_\_\_ E-Mail: \_\_\_\_\_

(8) CSR #1: \_\_\_\_\_ Position: \_\_\_\_\_  
Direct Line: ( ) \_\_\_\_\_ - \_\_\_\_\_ Direct Fax: ( ) \_\_\_\_\_ - \_\_\_\_\_  
Phone Extension: x \_\_\_\_\_ E-Mail: \_\_\_\_\_

(9) CSR #2: \_\_\_\_\_ Position: \_\_\_\_\_  
Direct Line: ( ) \_\_\_\_\_ - \_\_\_\_\_ Direct Fax: ( ) \_\_\_\_\_ - \_\_\_\_\_  
E-Mail: \_\_\_\_\_

(10) CSR #3: \_\_\_\_\_ Position: \_\_\_\_\_  
Direct Line: ( ) \_\_\_\_\_ - \_\_\_\_\_ Direct Fax: ( ) \_\_\_\_\_ - \_\_\_\_\_  
E-Mail: \_\_\_\_\_