

Application for agencies seeking an appointment with Zurich North America



All agencies interested in obtaining an appointment with Zurich North America must complete this formal application for consideration. After you submit the application, a Zurich representative will review the information. We will respond to your request in a timely manner. Submission of this application does not guarantee appointment with Zurich.

Qualifications for prospective appointments include the ability to write \$1 million in new business premiums within the succeeding 12-24 months; this new business should fall within Zurich's target market appetite.

Please note: Agencies already appointed with Zurich that wish to add a line of business do not need to complete this application. Please contact your local underwriter or business development leader.

Please upload the completed application to www.zurichna.com/brokerappointment

Referral information

If you were directly referred for appointment by a Zurich employee, please list their name:

Agency general information

Agency name

Street address

City

Country

State

ZIP Code

Agency phone number(s)

Extension

Agency email

Agency website URL

About your business

Is this a retail or wholesale brokerage?

Retail

Wholesale

Year agency was formed

Is the business incorporated?

Yes

No

Total number of employees

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How many producers does your firm employ

How many are benefits producers?

How many are Property and Casualty producers?

Annual agency revenue

\$

Overall premium/revenue from Property & Casualty lines

\$

In the chart below, please tell us which industries you service, the approximate premium and number of accounts.

Industry	Total premium	Total number of accounts
Construction (non-habitational)	\$	
Construction (habitational)	\$	
Real estate (non-habitational)	\$	
Real estate (habitational)	\$	
Manufacturing	\$	
Financial institutions	\$	
Healthcare	\$	
Gaming	\$	
Trucking/logistics	\$	
Pharmaceutical	\$	
Technology	\$	
Energy	\$	
Other (please specify)	\$	

In the chart below, please tell us which Market Segments you service, the approximate premium and number of accounts.

Market Segment	Total Premium	Total number of accounts
Construction	\$	
Middle Market	\$	
Large Casualty	\$	
Large Property	\$	
Surety	\$	
Financial Lines (e.g., D&O, E&O)	\$	
Other (please specify)	\$	

Does your firm specialize in any specific industry/industries, line(s) of business, etc.? If yes, please explain:

What are the top 5 insurance companies you place business with?

Name of company	Premium (estimate)	Top lines placed
1	\$	
2	\$	
3	\$	
4	\$	
5	\$	

Why are you seeking a Zurich appointment?

Which Zurich business units would you need access to?

- Construction
- Middle Market
- Large Casualty
- Large Property
- Surety
- Financial Products (e.g, D&O)
- Other (please specify)

What additional information you wish to share about your business?

How did you hear about Zurich North America?

- Referral
- Industry publication
- Social media
- Internet search
- Other (please explain)

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