

OWL UNDERWRITING AGENCY QUESTIONNAIRE

STRICTLY PRIVATE & CONFIDENTIAL

ORGANIZATION

1) Legal name of organization

2) Principal place of business and address

3) Postal address (if different)

4) Communication details:

• Web site

• E-mail

• Telephone number

• Fax number

5) Type of Organization (check relevant box)

Publicly held
Company
1

Privately
Held
Corporation
2

Partnership
3

Sole
Proprietor
4

Other (please
explain):

6) Parent company if
applicable:

7) Please list province(s)/state(s) in which you hold
a license and nature of these licence(s)

8) Has the organization, or any of its current stockholders,
directors, partners, proprietors or principal officers, ever been
convicted of a criminal offense? Yes No

If "Yes", please provide details

* Please attach an organizational chart of your structure & personnel

NATURE OF BUSINESS

1) Please check the box which best reflects the Applicant's main business activity:

Retail Insurance Broker

Wholesale Broker

Other

2) What is the approximate annual gross total premium volume of your organization for the past 3 years?

THE ORGANIZATION'S PROFESSIONAL INDEMNITY INSURANCE

1) Do you purchase Professional Indemnity (E&O) Insurance? Yes No

If yes please state:

2) Carrier:

Limit of Liability:

Deductible:

ACCOUNTING DEPARTMENT

1) Do you keep segregated funds or in trust accounts for insurance premiums

2) Please provide contact info for your accounting department:

Name: Telephone: ()

By:

Signature:

Position:

Date: