

Valuation Information Request

ORGANIZATION

Name
Address

Phone
Fax
Email
Type of Entity
Owner(s)

FINANCIAL

Fiscal Year 2016
Balance Sheet
P&L
Revenue Sources
 First Year Commission
 Renewal Commission
 Bonus
 Other

Fiscal Year 2015
Balance Sheet
P&L
Revenue Sources
 First Year Commission
 Renewal Commission
 Bonus
 Other
 Corporate Tax Return
 Personal Tax Return

Fiscal Year 2014
P&L
Revenue Sources
 First Year Commission
 Renewal Commission
 Bonus
 Other
Corporate Tax Return
Personal Tax Return

PRODUCTION

Calendar Year 2016

Premium or Revenue by Product Type
Number of Cases Submitted by Product Type
Number of Cases Paid For by Product Type
Personal Production Premium or Revenue

Calendar Year 2015

Premium or Revenue by Product Type
Number of Cases Submitted by Product Type
Number of Cases Paid For by Product Type
Personal Production Premium or Revenue

Calendar Year 2014

Premium or Revenue by Product Type
Number of Cases Submitted by Product Type
Number of Cases Paid For by Product Type
Personal Production Premium or Revenue

Top 25 Agents

Affiliation (Career Agents, Financial Advisors, BD, P&C, Independent,
Bank, Other)
Products Sold
Premium or Revenue/Year

Top 10 Affiliated Accounts

(Banks, Broker Dealers, Career Agencies, P&C, Independents, Financial
Advisors, Other Entity)

Agency Management System

STAFF

Total Employees

Job Descriptions (Clerical, Administration, Marketing, Sales, Other)

Key Employees

Skill Set
Current Duties
Length of Service
Compensation