



Prospect Information Form

Once completed, please make sure to send the form to AgencyServices@weston-ins.com.

Once the inside team has reviewed the application, we will send an on-boarding packet to the indicated point of contact.

OFFICE INFORMATION

Agency Name and DBA:	
Mailing Address, City, State and Zip Code:	
Physical Address, City, State, and Zip Code:	
Telephone:	County/Parish:
Writing Agent Name & License Number:	Agency General Email Address (For Policy Correspondence):
What is the agency entity type? Single Member LLC? Sole Proprietor? Corporation? Limited Liability Company?	

KEY CONTACT INFORMATION

Name/Title	Telephone	Email
Main Contact:		
Agency Principal:		
PL Manager:		
CL Manager:		

APPOINTMENT TYPE:

Active	Active - Conditional
Explanation:	Explanation:
Overall Meeting Notes:	Overall Meeting Notes: