

General Liability — Prospect Intake Form

Business Snapshot

Business Name:		DBA (if different):	
Business/Office Address:		City / State / ZIP:	
Mailing Address (if different):		City / State / ZIP:	
Contact Name:		Phone:	
Email:		Entity Type (LLC, Corp, Sole Prop, etc.):	
Years in Business:		Annual Revenue (approx.):	
Federal EIN:		Website (if any):	

Operations

Describe Business Operations / Products / Services:	
Are Operations Conducted at This Location Only? (Y/N — if no, list other locations):	
Any Subcontracted Work Performed or Hired Out? (Y/N — describe):	
Total Number of Employees (Full-Time / Part-Time):	
Total Annual Payroll:	
Estimated Annual Gross Sales/Receipts:	

Premises & Exposure

Square Footage Occupied:	
Building Owned or Leased?	
Any Public Access to Premises? (Y/N):	
Any Alcohol Sold or Served? (Y/N):	
Any Products Sold, Manufactured, or Distributed? (describe):	
Any Work Performed Away From Premises? (describe):	
Any Use of Subcontractors — Certificates of Insurance Collected? (Y/N):	

Coverage Requested

Desired GL Limits (Per Occurrence / Aggregate):	
Additional Insured Required? (Y/N — list who):	
Waiver of Subrogation Required? (Y/N):	

Loss History

Any Liability Claims in the Past 5 Years? (Y/N — describe):	
Current/Prior Carrier & Expiring Premium (if known):	
Requested Effective Date:	