

**COMMERCIAL CONTACT FORM**

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CONTACT NAME: \_\_\_\_\_

BUSINESS NAME: \_\_\_\_\_

PHONE: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

FAX: \_\_\_\_\_

CITY: \_\_\_\_\_ STATE: \_\_\_\_\_ ZIP: \_\_\_\_\_

EMAIL: \_\_\_\_\_

# LOCATIONS: \_\_\_\_\_

DESCRIPTION OF OPERATIONS:

# EMPLOYEES: \_\_\_\_\_

\_\_\_\_\_

# VEHICLES: \_\_\_\_\_

\_\_\_\_\_

MY CURRENT INSURANCE AGENT/AGENCY IS \_\_\_\_\_

I HAVE BEEN WITH MY CURRENT INSURANCE AGENT/AGENCY SINCE \_\_\_\_\_

WHY DID YOU CHOOSE YOUR CURRENT INSURANCE AGENT/AGENCY?

\_\_\_\_\_

WHAT CRITERIA OR PROCESS DO YOU USE TO SELECT AN AGENT/ AGENCY?

\_\_\_\_\_

WHAT DO YOU VALUE MOST IN YOUR CURRENT INSURANCE RELATIONSHIP?

\_\_\_\_\_

WHAT HAS YOUR CURRENT AGENT SPECIFICALLY DONE TO REDUCE YOUR LONG-TERM COST OF RISK?

\_\_\_\_\_

WHAT ARE THE COMPELLING REASONS YOU HAVE TO STAY WITH YOUR CURRENT AGENCY?

\_\_\_\_\_

HOW DID YOU HEAR ABOUT CUNNINGTON?

\_\_\_\_\_

WHAT SPECIFIC SERVICE EXPECTATIONS DOES CUNNINGTON NEED TO MEET IN ORDER TO EARN YOUR BUSINESS?

\_\_\_\_\_

COULD YOU ENVISION YOURSELF REPLACING YOUR CURRENT AGENCY?

YES  NO

**PLEASE NOTE:** CUNNINGTON & ASSOCIATES INC OPERATES ON A FEE FOR QUOTE BASIS UNLESS OTHERWISE NEGOTIATED. CUNNINGTON DOES NOT “ PRICE SHOP”, “BID” OR “QUOTE” POLICIES FOR INDIVIDUALS OR BUSINESSES THAT ARE NOT CURRENT CLIENTS OR REFERRALS TO CUNNINGTON. A MINIMUM FEE OF **\$150** IS REQUIRED PRIOR TO THE RELEASE OF ANY INSURANCE QUOTES. IF YOU CHOOSE TO PROCEED WITH QUOTE(S) PROVIDED BY CUNNINGTON, THIS FEE MAY BE APPLIED TO DOWN PAYMENT OR PREMIUM COSTS. IF YOU CHOOSE NOT TO PROCEED WITH QUOTE(S) PROVIDED BY CUNNINGTON THIS FEE IS NON-REFUNDABLE.

I UNDERSTAND THAT A SIGNED FEE AGREEMENT AND CHECK PAYABLE TO CUNNINGTON & ASSOCIATES INC IS REQUIRED PRIOR TO PROCEEDING WITH CUNNINGTON.

SIGNATURE \_\_\_\_\_

DATE \_\_\_\_\_