

Salt Lake City Area Office 8722 S. Harrison St. Sandy, UT 84070 P.O. Box 4439 Sandy, UT 84091 800-257-5590 • Fax 800-478-9880	Naples Office 700 11 <sup>th</sup> Street South, Suite 201 Naples, FL 34102 800-257-5590 • Fax 800-478-9880	Chicago Office 1 S. Dearborn Street, Suite 800 Chicago, IL 60603 800-257-5590 • Fax 800-478-9880	Philadelphia Area Office 690 Stockton Drive, Suite 100 Exton, PA 19341 800-257-5590 * Fax 800-478-9880
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*Please note we do not accept submissions more than 30 days from expiration. Feel free to give us an initial call to discuss at 877.243.8181.*



**Send all new submissions to the Underwriting Department:** [quotes@primeis.com](mailto:quotes@primeis.com)

### **Risk Summary:**

**RISK BUSINESS NAME:** \_\_\_\_\_

**City/ State:** \_\_\_\_\_ **Direct Phone Number:** \_\_\_\_\_

1. When is quote needed by? \_\_\_\_\_ Effective/Target date? \_\_\_\_\_ Years in Business? \_\_\_\_\_
2. Why are they shopping? \_\_\_\_\_
3. Narrative of the operation / risk: \_\_\_\_\_
4. What coverage are you having difficulty placing? \_\_\_\_\_
5. Current coverage premium? \_\_\_\_\_ Limits? \_\_\_\_\_
6. Target premium? \_\_\_\_\_
7. Claims Summary below. Attach separately currently valued hard copy (within 45 days) 5-year loss history (if applicable) with claim details: circumstance, extent of injury/damage. Include how they are mitigating future claims.  
Summarize totals below for the number of years they have been in business.
  - a. 2019 - 2020:
  - b. 2020 - 2021:
  - c. 2021 - 2022:
  - d. 2022 - 2023:
  - e. 2023 - 2024:
8. Are they being offered a renewal quote? \_\_\_\_\_ If yes, what are limits/premium? \_\_\_\_\_
9. Any contractual requirements? \_\_\_\_\_ If so, please attach copy.
10. Are they being non-renewed/cancelled? \_\_\_\_\_ If so, why? \_\_\_\_\_
11. Are other markets offering terms? \_\_\_\_\_ If yes, what are terms: premium/limits? \_\_\_\_\_
12. If not, why? \_\_\_\_\_

### **Our definition of a complete submission includes:**

- ☐ Completed Supplemental Application
- ☐ Loss Runs (Currently valued within 45 days matching number of years in business). 5 years if applicable
- ☐ Any Contractual Requirements

**Note:** As a solutions-based carrier we are very successful with risks that are having a difficult time finding the correct coverage. Please keep in mind, understanding why the business is coming to us and what coverage they are looking for is extremely helpful. To formalize quote terms, we require a call with the insured owner / decision-maker; we encourage agents/brokers to join. This call gives us the opportunity to assess the insured's partnership commitment and details of their operation.