

## Buying Agent/Agency Questionnaire

**About the Applicant:**

Name: \_\_\_\_\_ Email: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

How many years of sales/management experience do you have? \_\_\_\_\_

How many years insurance experience do you have? \_\_\_\_\_ How many with Farmers? \_\_\_\_\_

Please list the states in which you are licensed **and** your license #s: \_\_\_\_\_

\_\_\_\_\_

Are you life insurance licensed? \_\_\_\_\_ Are you Series 6-63 licensed? \_\_\_\_\_

Who is your District Manager? \_\_\_\_\_ Email: \_\_\_\_\_

Phone: \_\_\_\_\_

**Please complete the following if you currently own a Farmers agency (Please photocopy and attach a separate sheet for each agency owned):**

Legal Name of Agency: \_\_\_\_\_

Legal Form of Agency (corporation, dba, etc.): \_\_\_\_\_

Current Agency Address: \_\_\_\_\_  
Street City State Zip

Current Rental Rate: \$ \_\_\_\_\_ Telephone: \_\_\_\_\_  
Business Phone Business Fax

Do you plan to relocate the agency? \_\_\_\_\_ Anticipated agency relocation date: \_\_\_\_\_

Relocation Address: \_\_\_\_\_  
Street City State Zip

Phone/Fax: \_\_\_\_\_  
Office Phone Office Fax

Please list all of your Farmers Agent #s and corresponding Contract dates: \_\_\_\_\_

\_\_\_\_\_

Year agency was established: \_\_\_\_\_ Length of your ownership: \_\_\_\_\_

Do you have any debt on your agency? \_\_\_\_\_ Please list all lenders and amounts owed: \_\_\_\_\_

\_\_\_\_\_

How many licensed staff do you employ? \_\_\_\_\_ How many unlicensed staff? \_\_\_\_\_

**Please complete the following if you have acquired another book of business in the past 3 years.**

**(If more than one book of business has been acquired, please photocopy and fill out a separate sheet for each agency acquired):**

Seller's Name: \_\_\_\_\_

Legal Name of Agency: \_\_\_\_\_

Legal Form of Agency (corporation, dba, etc.): \_\_\_\_\_

Purchased Agency Address:

\_\_\_\_\_  
Street City State Zip

Was the agency merged into your agency? \_\_\_\_\_ If so, does it have a separate agent#? \_\_\_\_\_

Purchase price of agency: \_\_\_\_\_ Date the book was transferred: \_\_\_\_\_

Amount financed: \_\_\_\_\_ Interest rate on the loan : \_\_\_\_\_

Monthly payment: \_\_\_\_\_ Number of months on the loan: \_\_\_\_\_

Collateral provided: \_\_\_\_\_

When was the agency established? \_\_\_\_\_ How long had the seller owned it? \_\_\_\_\_

**Please complete the following section regarding the agency you are purchasing.**

Do you plan to relocate the agency? \_\_\_\_\_ Anticipated agency relocation date: \_\_\_\_\_

Phone/Fax: \_\_\_\_\_  
Office Phone Office Fax

Relocation Address: \_\_\_\_\_  
Street City State Zip

Please list all staff members being retained by buyer and their positions: \_\_\_\_\_

\_\_\_\_\_

Anticipated sale date: \_\_\_\_\_

**Buyer's Affirmation: I hereby certify that the above information is true and correct to the best of my knowledge:**

**Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_