



BUSINESS PROFILE

Business Name: _____
Address: _____ City: _____ State: _____ Zip Code: _____

OPERATIONS

1. Have your operations changed at all? Yes No
If yes, please explain. _____
2. Any change in ownership or entity type? Yes No
If yes, please explain _____
3. Do you provide healthcare benefits and pay at least 50% of the cost? Yes No
If yes, would you like to Save 10% by integrating your Group Health with Work Comp? Yes No
4. Do you have a Return to Work Plan for injured workers? Yes No
5. Do you lease, contract, or hire temporary employees/labor? Yes No
If yes, please list outsourcing agency and send Certificate of Insurance.

6. Please list membership in any "Trade" Associations: _____
7. Do you participate in or plan to in any OCIP, CCIP or Wrap-Up Programs? Yes No

Please provide an estimate of the annual payroll and # of employees, excluding owners/officers, for the coming year.

| Class Code | Description | # Full Time | # Part Time | Est. Ann Payroll |
|------------|-------------|-------------|-------------|------------------|
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This Form was completed by (please print) _____ Title _____
Signature: _____ Date: _____
Phone: _____ Email: _____

I have questions and would like to schedule a phone or office visit to discuss my insurance. Yes No

Referral
Rewards



Tell your friends about us and receive \$5 CASH!

We always ask our new customers who referred them to our agency. If someone we ask gives us *your* name, we will send you a \$5 bill!
Qualified Referrals*