

## Baytree Finance Company Agent Broker Profile

Agent/Broker Name: \_\_\_\_\_ Date: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Telephone #: \_\_\_\_\_ Fax #: \_\_\_\_\_

Website: \_\_\_\_\_

Sales Contact: \_\_\_\_\_

Name	Phone Number	Email
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PF Coordinator: \_\_\_\_\_

Name	Phone Number	Email
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Systems Contact: \_\_\_\_\_

Name	Phone Number	Email
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Operations Contact: \_\_\_\_\_

Name	Phone Number	Email
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Agency Principal: \_\_\_\_\_

Name	Phone Number	Email
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### REQUIRED AGENCY INFORMATION

Estimated Annual Premium Volume		Number of Employees	
Estimated Annual Financed Volume		Number of Producers	
Years in Business		Federal Tax ID#	
Agency Management System		Special Programs/Business	
Portfolio Mix	Commercial _____% Personal _____%	Current Finance Source (s)	

**Preferred Funding Method:**    ACH             Standard Funding             Fund Carriers / MGAs / General Agents Only

#### Bank Reference Information

Bank Name: \_\_\_\_\_ Contact Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Account #: \_\_\_\_\_ ABA #: \_\_\_\_\_

Address: \_\_\_\_\_ Account Name: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

#### Authorization to Release Information

I hereby authorize the above listed references to release information to Baytree Finance Company. All information provided to Baytree Finance Company will be held in strict confidence.

Signed By: \_\_\_\_\_ Title: \_\_\_\_\_

Print Name: \_\_\_\_\_ Date: \_\_\_\_\_