

Small Business Questionnaire (SBQ)

Date

Named Insured:

Entities Identified on Policy:

Dated Completed:

Completed By:

The renewal date of your insurance coverage with our office is fast approaching, and it is important that we keep our information current. We would appreciate your taking a moment to answer the following questions. If we do not hear back from you, we will assume that there have not been any changes.

	Yes	No
1. Is the named insured listed above correct?		
2. Are all entities identified above correct?		
3. Any new corporations, partnerships, limited partnerships or joint ventures?		
4. Have you started, changed or discontinued any activities or operations during the past year?		
5. Any products to be sold, added or discontinued in the coming year?		
6. Have you entered into any new contractual arrangements, including leased property?		
7. Please provide: Current Sales: Payroll: No. of Employees:		
8. Have you purchased, leased, or acquired any real property or locations (including vacant land)?		
9. Are all owned and leased locations listed on your current policy?		
10. Do you own the buildings at any of your locations?		
11. Is the building in the Business name or a Personal name? Please provide the name if Personal		
12. If a tenant, have you made improvement to the building you lease?		
13. Do you need coverage for personal property of others that is in your care, custody or control?		
14. Would you like to discuss increasing the limit on your building/contents?		
15. Should the following be covered on your policy: Fences, signs, light poles, antennas, awnings, glass, carports?		
16. Is your computer equipment/software limit adequate?		
17. Circle any items with changes to business-owned items: Contractor's equipment, patterns, tools permanently installed equipment		
18. Any change needed to coverage for accounts receivable, valuable papers, stocks, blue prints?		
19. Do you have machinery/equipment that is critical to your business not included in your current policy?		

	Yes	No
20. Are you interested in a quote for Wind, Hail, Flood or Earthquake coverage for contents and/or building?		
21. If you have a Wind, Hail, Flood or Earthquake policy, your limits may or may not match your contents/building coverage. Would you be interested in a quote for higher limits?		
22. Is your Business Income/Extra Expense/Rental Income limit adequate?		
23. Do you have an exposure for loss of Business Income due to Off Premises Power Failure/Service Interruption?		
24. Any changes to fire, sprinkler or security systems?		
25. Circle any items with changes to business-owned items: Autos, Trucks, Boats, Yachts, Aircraft		
26. Do your employees rent vehicles or use their own cars for company business?		
27. Any vehicle / driver changes?		
28. Are you interested in higher limits of liability?		
29. Are you doing any business outside of the US?		
30. Do you have any employee payroll in states not currently listed on your policy?		
31. Are you sponsoring any teams or conducting any unusual promotional activities?		
32. Have there been any unreported legal actions brought against you during the past year?		
33. Are you required to carry liquor liability coverage?		
34. Do you have a pollution liability exposure? (Above/below ground storage tanks, etc.)		
35. Are you interested in discussing various forms of crime coverage, e.g. employee dishonesty, robbery, credit card fraud, funds transfer fraud, ID Theft?		
36. Are you interested in discussing protection for allegations of discrimination, harassment, etc?		
37. Would you like a quote for Internet / Cyber Liability coverage?		
38. Would you like a quote for Professional Liability or Directors & Officers Liability?		
39. Are there any new employee benefits programs?		
40. Do you sponsor employee benefit plans that require an ERISA bond?		
Remarks: Any additional changes in your operation that may expose you to a potential loss?		

Thank you for choosing Brown & Brown

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Compensation. In addition to the commissions or fees received by us for assistance with the placement, servicing, claims handling, or renewal of your insurance coverages, other parties, such as excess and surplus lines brokers, wholesale brokers, reinsurance intermediaries, underwriting managers and similar parties, some of which may be owned in whole or in part by Brown & Brown, Inc., may also receive compensation for their role in providing insurance products or services to you pursuant to their separate contracts with insurance or reinsurance carriers. That compensation is derived from your premium payments. Additionally, it is possible that we, or our corporate parents or affiliates, may receive contingent payments or allowances from insurers based on factors which are not client-specific, such as the performance and/or size of an overall book of business produced with an insurer. We generally do not know if such a contingent payment will be made by a particular insurer, or the amount of any such contingent payments, until the underwriting year is closed. That compensation is partially derived from your premium dollars, after being combined (or “pooled”) with the premium dollars of other insureds that have purchased similar types of coverage. We may also receive invitations to programs sponsored and paid for by insurance carriers to inform brokers regarding their products and services, including possible participation in company-sponsored events such as trips, seminars, and advisory council meetings, based upon the total volume of business placed with the carrier you select. We may, on occasion, receive loans or credit from insurance companies. Additionally, in the ordinary course of our business, we may receive and retain interest on premiums you pay from the date we receive them until the date of premiums are remitted to the insurance company or intermediary. In the event that we assist with placement and other details of arranging for the financing of your insurance premium, we may also receive a fee from the premium finance company.

If an intermediary is utilized in the placement of coverage, the intermediary may or may not be owned in whole or part by Brown & Brown, Inc. or its subsidiaries. Brown & Brown entities operate independently and are not required to utilize other companies owned by Brown & Brown, Inc., but routinely do so. In addition to providing access to the insurance company, the Wholesale Insurance Broker/Managing General Agent may provide additional services including, but not limited to: underwriting; loss control; risk placement; coverage review; claims coordination with insurance company; and policy issuance. Compensation paid for those services is derived from your premium payment, which may on average be 15% of the premium you pay for coverage, and may include additional fees charged by the intermediary.

Questions and Information Requests. Should you have any questions, or require additional information, please contact this office at 214-301-3333 or, if you prefer, submit your question or request online at <http://www.bbinsurance.com/customerinquiry/>