

**Lorena Sanchez:** **Lorena.Sanchez@epicbrokers.com**

**Adam Green:** **Adam.Green@epicbrokers.com**

 **FMCSA BOND APPLICATION**

|  |
| --- |
| Full Legal Name of Company:      |
| **[ ]** Sole Ownership -[ ]  Partnership - [ ] Corporation - [ ] LLC |
| Business Address      | Phone:       | Fax:       |
| E-mail:       | Country or State of Incorporation:       |
| Type of Bond: **FMCSA** | IRS #:      | MC#       orFF#       | Term: Continuous | Amount:      | Effective Date:      |
| Has application for this bond been declined by another company? If yes, state particulars      |
| If prior Surety, give name and reason for change:       |
| Has the business or any other principal involved: | Yes | No | If any answer is yes, attach a detailed statement |
| a. Had any lawsuits or judgments against them? |  [ ]  |  [ ]  |
| b. Ever failed in business or declared Bankruptcy? |  [ ]  |  [ ]  |
| c. Ever been convicted of a felony? |  [ ]  |  [ ]  |
| d. Ever had their license suspended, revoked or denied? |  [ ]  |  [ ]  |
| e. Ever been a party to a surety bond claim? |  [ ]  |  [ ]  |

Info for all owners to complete – Please include information for parent company as well

|  |  |  |  |
| --- | --- | --- | --- |
| Name/Title: |       | Social Security #: |        |
| Spouse: |        | Social Security #: |        |
| % ownership: |        | # years owned business: |        | # years of experience in this industry: |        |
| Address:       | Balance of Mortgage: |        |
| Fair market value of home: |        |

|  |  |  |  |
| --- | --- | --- | --- |
| Name/Title: |        | Social Security #: |        |
| Spouse: |        | Social Security #: |        |
| % ownership: |        | # years owned business: |        | # years of experience in this industry: |        |
| Address:      | Balance of Mortgage: |        |
| Fair market value of home: |        |

|  |  |  |  |
| --- | --- | --- | --- |
| Name/Title: |        | Social Security #: |        |
| Spouse: |        | Social Security #: |        |
| % ownership: |        | # years owned business: |        | # years of experience in this industry: |        |
| Address:      | Balance of Mortgage: |        |
| Fair market value of home: |        |

APPLICANT ACKNOWLEDGES THAT CREDIT DATA MAY BE ACCESSED FOR THE UNDERWRITING OF THIS BOND.



***Compensation Disclosure to Clients***

Edgewood Partners Holdings, LLC, along with its subsidiaries and affiliates (including Edgewood Partners Insurance Center) (collectively, “EPIC”) is a leading insurance broker and is committed to loyally providing quality service to its clients in a transparent manner. EPIC secures and otherwise facilitates the placing, servicing, claims handling or renewal of insurance or reinsurance coverage for its clients from a variety of insurance carriers, group benefits providers, and markets (collectively “Insurers”), and sometimes engages the services of other entities, including, but not limited to, wholesale brokers, some of which may be owned in whole or part by EPIC, captive managers or premium finance companies (collectively, “Intermediaries”).

EPIC is compensated in a variety of ways for the services it provides to its clients, and a particular placement may involve one or a combination of such arrangements. Primarily, EPIC is compensated through commission payments that are based on (and a part of) the premium charged and collected by Insurers for each insurance policy secured for EPIC’s clients. In some cases, EPIC may receive specific fees from clients in lieu of or, as permitted, in addition to, such commissions, for the placement of coverage and/or for other services or projects.

EPIC may also receive from Insurers and/or Intermediaries other forms of compensation, such as incentive or contingency payments or commissions, supplemental commissions, bonuses, wholesale or co-brokerage commissions, service fees or allowances, each of which may be based on a variety of factors, including, but not limited to, the overall volume of premiums with such party for a certain period; the overall growth, persistency and/or retention of the premiums with such party for a certain period; and, in certain cases, the profitability of the total premium paid to such party for insurance policies placed for EPIC’s clients for a certain period (i.e., aggregate loss history on the insurance policies placed for EPIC’s clients).

In addition to the fees and commissions discussed above, EPIC may receive investment income on fiduciary funds temporarily held by it, such as premiums or return premiums, as well as fees for arranging premium financing for clients with third parties. EPIC also may receive fees, commissions or other compensation from Insurers and Intermediaries or other parties for providing data analytics products and services and/or consulting, marketing or other services. Such products and services may include information from developed data that is designed to improve the product offerings available to EPIC’s clients, assist Insurers in identifying new opportunities and enhance Insurers’ operational efficiency.

EPIC will provide its clients with additional details about the forms of compensation earned for the placement of their respective insurance policies or alternative quotes presented, upon written request from such client.