# Agent Summary

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $67,596 | -37.7% | 8.3% | $61,047 | -37.5% | $2,396 | -523.3% | 11 | -8.3% | 61.1% | $6,145 | 10/31/2025 |
| | Personal Auto | $2,037,166 | 10.4% | 66.4% | $1,723,595 | 6.4% | $150,603 | -19.8% | 528 | -3.8% | 52.9% | $3,858 | 10/31/2025 |
| | **Total** | **$2,104,762** | **7.7%** | **64.7%** | **$1,784,642** | **3.9%** | **$152,999** | **-18.3%** | **539** | **-3.9%** | **53.0%** | **$3,905** | |
| Foremost Choice | Dwelling Fire | $9,838,281 | 28.9% | 35.7% | $8,344,852 | 26.1% | $865,369 | 28.0% | 6,054 | 15.8% | 82.1% | $1,625 | 10/31/2025 |
| | Home | $3,119,590 | 29.5% | 81.2% | $2,754,595 | 28.0% | $270,994 | 7.9% | 1,569 | 30.3% | 85.5% | $1,988 | 10/31/2025 |
| | Marine | $127,698 | 16.9% | 100.2% | $116,898 | 20.2% | $3,277 | 26.3% | 222 | 5.2% | 88.8% | $575 | 10/31/2025 |
| | Mobile Home | $5,208,645 | 3.2% | 39.1% | $4,415,957 | 2.3% | $302,325 | -11.2% | 3,930 | -1.8% | 87.8% | $1,325 | 10/31/2025 |
| | Motor Home | $87,076 | -6.9% | 175.9% | $75,759 | 0.6% | $8,933 | -32.8% | 67 | 3.1% | 83.8% | $1,300 | 10/31/2025 |
| | Motorcycle | $253,560 | 8.2% | 52.9% | $231,575 | 7.8% | $18,180 | -14.0% | 397 | 9.4% | 79.6% | $639 | 10/31/2025 |
| | Off-Road Veh | $82,223 | -4.8% | 41.5% | $72,116 | -1.3% | $5,529 | -19.6% | 396 | 2.9% | 83.0% | $208 | 10/31/2025 |
| | Other | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $857,096 | 1.6% | 37.9% | $719,171 | -4.2% | $43,087 | -36.0% | 890 | -4.1% | 83.7% | $963 | 10/31/2025 |
| | Travel Trailer | $189,813 | -2.3% | 95.1% | $164,538 | -10.1% | $5,667 | -64.8% | 335 | 1.8% | 79.2% | $567 | 10/31/2025 |
| | **Total** | **$19,763,982** | **18.7%** | **45.4%** | **$16,895,461** | **16.7%** | **$1,523,361** | **9.2%** | **13,860** | **9.0%** | **84.1%** | **$1,426** | |
| Farmers | Farmers Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 9/30/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| **Grand Total** | | **$21,868,744** | **17.5%** | **47.5%** | **$18,680,103** | **15.3%** | **$1,676,360** | **5.9%** | **14,399** | **8.4%** | **82.3%** | **$1,519** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 105 | 6 | $27,186 | 98 | 6 | $27,186 | 0.06 | 11 | 1 | $924 | 9.1% | 10/31/2025 |
| | Personal Auto | 27,607 | 450 | $904,974 | 23,333 | 374 | $737,329 | 0.02 | 2,244 | 37 | $73,076 | 1.6% | 10/31/2025 |
| | **Total** | **27,712** | **456** | **$932,160** | **23,431** | **380** | **764,515** | **0.02** | **2,255** | **38** | **$74,000** | **1.7%** | |
| Farmers | Farmers Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 9/30/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 10,528 | 2,141 | $4,028,729 | 8,964 | 1,828 | $3,428,158 | 0.20 | 791 | 190 | $369,643 | 24.0% | 10/31/2025 |
| | Home | 3,364 | 632 | $1,030,086 | 2,895 | 535 | $865,195 | 0.18 | 242 | 44 | $70,318 | 18.2% | 10/31/2025 |
| | Marine | 148 | 39 | $27,093 | 142 | 36 | $26,319 | 0.25 | 16 | 3 | $2,072 | 18.8% | 10/31/2025 |
| | Mobile Home | 1,891 | 473 | $563,951 | 1,632 | 410 | $480,183 | 0.25 | 133 | 31 | $37,111 | 23.3% | 10/31/2025 |
| | Motor Home | 80 | 15 | $20,507 | 72 | 14 | $20,161 | 0.19 | 8 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 649 | 136 | $101,049 | 585 | 123 | $93,155 | 0.21 | 57 | 11 | $7,817 | 19.3% | 10/31/2025 |
| | Off-Road Veh | 210 | 92 | $22,551 | 190 | 86 | $20,737 | 0.45 | 19 | 10 | $2,916 | 52.6% | 10/31/2025 |
| | Other | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 399 | 135 | $149,978 | 320 | 102 | $123,860 | 0.32 | 36 | 15 | $16,007 | 41.7% | 10/31/2025 |
| | Travel Trailer | 270 | 94 | $59,343 | 237 | 82 | $48,909 | 0.35 | 21 | 7 | $2,986 | 33.3% | 10/31/2025 |
| | **Total** | **17,539** | **3,757** | **$6,003,287** | **15,037** | **3,216** | **5,106,677** | **0.21** | **1,323** | **311** | **$508,870** | **23.5%** | |
| **Grand Total** | | **45,251** | **4,213** | **$6,935,447** | **38,468** | **3,596** | **5,871,192** | **0.09** | **3,578** | **349** | **$582,870** | **9.8%** | |

**AL**

# State Summary

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $11,279 | 9999.9% | 147.7% | $3,776 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 50.0% | $11,279 | 10/31/2025 |
| | **Total** | **$11,279** | **9999.9%** | **147.7%** | **$3,776** | **9999.9%** | **$0** | **0.0%** | **1** | **9999.9%** | **50.0%** | **$11,279** | |
| Foremost Choice | Dwelling Fire | $87,541 | -4.6% | 260.9% | $79,441 | 1.5% | $5,782 | 439.4% | 50 | -7.4% | 78.1% | $1,751 | 10/31/2025 |
| | Home | $10,550 | 20.1% | 18.7% | $7,986 | 25.0% | $2,819 | 96.2% | 6 | -14.3% | 85.7% | $1,758 | 10/31/2025 |
| | Marine | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $29,576 | 14.0% | 23.1% | $23,391 | 32.2% | $699 | -123.7% | 16 | 0.0% | 84.2% | $1,849 | 10/31/2025 |
| | Motor Home | $367 | -77.0% | 11.0% | $367 | -77.0% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $92 | -65.2% | -7.7% | ($172) | 0.0% | $0 | 0.0% | 1 | 0.0% | 50.0% | $92 | 10/31/2025 |
| | Off-Road Veh | $1,297 | 126.4% | 9.8% | $1,297 | 126.4% | $0 | 0.0% | 3 | 50.0% | 100.0% | $432 | 10/31/2025 |
| | Rental M.H. | $27,058 | 3.1% | 16.4% | $23,287 | -1.3% | $957 | 9999.9% | 29 | -3.3% | 87.9% | $933 | 10/31/2025 |
| | Travel Trailer | $1,724 | -2.3% | 12.7% | $405 | -14.9% | $0 | 0.0% | 3 | 0.0% | 75.0% | $575 | 10/31/2025 |
| | **Total** | **$158,205** | **0.8%** | **155.7%** | **$136,002** | **5.8%** | **$10,257** | **-2425.9%** | **108** | **-5.3%** | **81.2%** | **$1,465** | |
| **Grand Total** | | **$169,484** | **8.0%** | **155.2%** | **$139,778** | **8.7%** | **$10,257** | **-2425.9%** | **109** | **-4.4%** | **80.7%** | **$1,555** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 100 | 2 | $7,503 | 67 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **100** | **2** | **$7,503** | **67** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 110 | 10 | $16,168 | 101 | 8 | $13,448 | 0.08 | 14 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 4 | 0 | $0 | 4 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 34 | 3 | $5,005 | 29 | 2 | $2,874 | 0.07 | 2 | 1 | $1,470 | 50.0% | 10/31/2025 |
| | Motor Home | 4 | 0 | $0 | 4 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 4 | 1 | $92 | 4 | 1 | $92 | 0.25 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 3 | 1 | $741 | 3 | 1 | $741 | 0.33 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 7 | 3 | $1,276 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 4 | 1 | $690 | 4 | 1 | $690 | 0.25 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **170** | **19** | **$23,972** | **151** | **13** | **17,845** | **0.09** | **18** | **1** | **$1,470** | **5.6%** | |
| **Grand Total** | | **270** | **21** | **$31,475** | **218** | **13** | **17,845** | **0.06** | **18** | **1** | **$1,470** | **5.6%** | |

**AR**

# State Summary

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $361 | 9999.9% | 0.4% | $361 | 9999.9% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$361** | **9999.9%** | **0.4%** | **$361** | **9999.9%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $409,528 | 11.6% | 42.1% | $353,521 | 6.6% | $33,307 | -31.7% | 214 | 17.6% | 80.8% | $1,914 | 10/31/2025 |
| | Home | $350,581 | 0.7% | 324.2% | $319,004 | 0.9% | $8,694 | -83.0% | 171 | 1.2% | 83.0% | $2,050 | 10/31/2025 |
| | Marine | $2,101 | 31.1% | 3.5% | $2,101 | 31.1% | $0 | 0.0% | 5 | 66.7% | 100.0% | $420 | 10/31/2025 |
| | Mobile Home | $29,985 | -22.3% | 24.2% | $27,307 | -23.1% | $957 | -76.8% | 20 | -16.7% | 74.1% | $1,499 | 10/31/2025 |
| | Motor Home | $8,706 | 2.4% | 15.2% | $8,706 | 2.4% | $0 | -100.0% | 2 | 0.0% | 100.0% | $4,353 | 10/31/2025 |
| | Motorcycle | $2,552 | 671.0% | 138.1% | $2,221 | 9999.9% | $0 | 0.0% | 2 | 100.0% | 100.0% | $1,276 | 10/31/2025 |
| | Off-Road Veh | $4,458 | -14.2% | 337.2% | $3,883 | -5.2% | ($85) | -143.4% | 14 | 7.7% | 82.4% | $318 | 10/31/2025 |
| | Rental M.H. | $13,018 | -4.5% | 18.8% | $10,987 | 24.0% | $2,124 | 76.9% | 15 | 0.0% | 83.3% | $868 | 10/31/2025 |
| | Travel Trailer | $14,546 | -33.2% | 151.8% | $13,167 | -43.0% | $38 | -99.0% | 24 | -14.3% | 75.0% | $606 | 10/31/2025 |
| | **Total** | **$835,475** | **3.8%** | **165.7%** | **$740,897** | **1.6%** | **$45,035** | **-61.3%** | **467** | **6.9%** | **81.4%** | **$1,789** | |
| **Grand Total** | | **$835,836** | **3.9%** | **165.7%** | **$741,258** | **1.6%** | **$45,035** | **-61.3%** | **467** | **6.9%** | **81.2%** | **$1,790** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 85 | 1 | $1,450 | 62 | 1 | $1,450 | 0.02 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **85** | **1** | **$1,450** | **62** | **1** | **1,450** | **0.02** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 588 | 83 | $159,434 | 491 | 64 | $124,959 | 0.13 | 21 | 4 | $8,005 | 19.0% | 10/31/2025 |
| | Home | 214 | 37 | $72,094 | 181 | 26 | $52,075 | 0.14 | 8 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 4 | 2 | $827 | 4 | 2 | $827 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 41 | 3 | $6,321 | 28 | 3 | $6,321 | 0.11 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 3 | 0 | $0 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 2 | 1 | $504 | 2 | 1 | $504 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 16 | 4 | $1,115 | 15 | 4 | $1,115 | 0.27 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 14 | 3 | $2,510 | 12 | 3 | $2,510 | 0.25 | 1 | 1 | $893 | 100.0% | 10/31/2025 |
| | Travel Trailer | 19 | 4 | $3,969 | 17 | 3 | $3,223 | 0.18 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **901** | **137** | **$246,774** | **753** | **106** | **191,534** | **0.14** | **35** | **5** | **$8,898** | **14.3%** | |
| **Grand Total** | | **986** | **138** | **$248,224** | **815** | **107** | **192,984** | **0.13** | **35** | **5** | **$8,898** | **14.3%** | |

**AZ**

# State Summary

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $7,041 | -34.2% | -3.6% | $7,041 | -34.2% | $0 | 0.0% | 1 | -50.0% | 33.3% | $7,041 | 10/31/2025 |
| | Personal Auto | $65,537 | -41.3% | 103.7% | $64,197 | -29.2% | $2,885 | -77.8% | 19 | -5.0% | 54.3% | $3,449 | 10/31/2025 |
| | **Total** | **$72,578** | **-40.7%** | **94.0%** | **$71,238** | **-29.8%** | **$2,885** | **-77.8%** | **20** | **-9.1%** | **52.6%** | **$3,629** | |
| Foremost Choice | Dwelling Fire | $70,367 | 43.9% | 92.4% | $56,730 | 23.7% | $172 | -94.7% | 32 | 10.3% | 76.2% | $2,199 | 10/31/2025 |
| | Home | $31,791 | 11.6% | 10.0% | $31,791 | 34.2% | $4,122 | -42.8% | 27 | 8.0% | 96.4% | $1,177 | 10/31/2025 |
| | Marine | $2,690 | -11.1% | 16.1% | $2,690 | 2.8% | $410 | 0.0% | 2 | 0.0% | 100.0% | $1,345 | 10/31/2025 |
| | Mobile Home | $7,489 | 6.0% | 12.4% | $3,431 | -19.0% | $0 | -100.0% | 4 | 0.0% | 100.0% | $1,872 | 10/31/2025 |
| | Motor Home | $802 | -55.8% | 5.2% | $802 | -55.8% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $1,154 | 28.1% | 2.2% | $1,154 | 28.1% | $209 | 9999.9% | 2 | 100.0% | 100.0% | $577 | 10/31/2025 |
| | Off-Road Veh | $590 | -47.4% | 0.1% | $590 | -47.4% | ($478) | -1211.6% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $0 | -100.0% | 14.2% | $0 | -100.0% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Travel Trailer | $296 | -32.7% | 3.0% | $0 | -100.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $296 | 10/31/2025 |
| | **Total** | **$115,179** | **21.9%** | **59.2%** | **$97,188** | **17.2%** | **$4,435** | **-62.2%** | **68** | **4.6%** | **81.9%** | **$1,694** | |
| **Grand Total** | | **$187,757** | **-13.4%** | **74.5%** | **$168,426** | **-8.7%** | **$7,320** | **-70.4%** | **88** | **1.1%** | **72.7%** | **$2,134** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 26 | 1 | $12,196 | 26 | 1 | $12,196 | 0.04 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 1,096 | 15 | $30,880 | 934 | 14 | $28,623 | 0.01 | 67 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **1,122** | **16** | **$43,076** | **960** | **15** | **40,819** | **0.02** | **67** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 127 | 13 | $25,455 | 98 | 8 | $16,454 | 0.08 | 3 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 26 | 3 | $4,485 | 20 | 3 | $4,485 | 0.15 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 4 | 0 | $0 | 3 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 1 | 1 | $2,495 | 1 | 1 | $2,495 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 1 | 1 | $155 | 1 | 1 | $155 | 1.00 | 1 | 1 | $155 | 100.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **159** | **18** | **$32,590** | **123** | **13** | **23,589** | **0.11** | **5** | **1** | **$155** | **20.0%** | |
| **Grand Total** | | **1,281** | **34** | **$75,666** | **1,083** | **28** | **64,408** | **0.03** | **72** | **1** | **$155** | **1.4%** | |

**CA**

# State Summary

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $35,180 | -27.0% | 65.9% | $28,979 | -19.5% | $2,396 | -499.3% | 4 | -20.0% | 66.7% | $8,795 | 10/31/2025 |
| | Personal Auto | $25,361 | 41.2% | 164.1% | $17,884 | 12.8% | ($143) | -101.9% | 5 | -16.7% | 71.4% | $5,072 | 10/31/2025 |
| | **Total** | **$60,541** | **-8.5%** | **116.3%** | **$46,863** | **-9.6%** | **$2,253** | **-67.9%** | **9** | **-18.2%** | **69.2%** | **$6,727** | |
| Foremost Choice | Dwelling Fire | $290,523 | 74.1% | 58.6% | $257,050 | 68.3% | $36,419 | 73.9% | 112 | 9.8% | 90.3% | $2,594 | 10/31/2025 |
| | Home | $52,204 | 42.2% | 12.7% | $52,204 | 42.2% | $0 | 0.0% | 11 | 10.0% | 100.0% | $4,746 | 10/31/2025 |
| | Marine | ($14) | -111.2% | -1.6% | ($14) | -111.2% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $27,114 | 17.1% | 13.0% | $24,107 | 27.1% | $1,022 | 9999.9% | 20 | 11.1% | 95.2% | $1,356 | 10/31/2025 |
| | Motor Home | $512 | 6.0% | 7.1% | $512 | 6.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $512 | 10/31/2025 |
| | Motorcycle | $2,822 | 11.9% | 3.0% | $2,713 | 7.5% | $60 | 9999.9% | 3 | 0.0% | 100.0% | $941 | 10/31/2025 |
| | Off-Road Veh | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $2,728 | 18.6% | 11.5% | $2,728 | 18.6% | $0 | 0.0% | 2 | 0.0% | 100.0% | $1,364 | 10/31/2025 |
| | Travel Trailer | $888 | -28.5% | 6.7% | $978 | -21.3% | $555 | 9999.9% | 3 | 50.0% | 75.0% | $296 | 10/31/2025 |
| | **Total** | **$376,777** | **61.4%** | **46.1%** | **$340,278** | **58.2%** | **$38,056** | **81.7%** | **152** | **9.4%** | **91.0%** | **$2,479** | |
| **Grand Total** | | **$437,318** | **46.0%** | **59.7%** | **$387,141** | **45.0%** | **$40,309** | **44.2%** | **161** | **7.3%** | **89.4%** | **$2,716** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 7 | 1 | $924 | 7 | 1 | $924 | 0.14 | 4 | 1 | $924 | 25.0% | 10/31/2025 |
| | Personal Auto | 38 | 1 | $2,058 | 37 | 1 | $2,058 | 0.03 | 4 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **45** | **2** | **$2,982** | **44** | **2** | **2,982** | **0.05** | **8** | **1** | **$924** | **12.5%** | |
| Foremost Choice | Dwelling Fire | 181 | 22 | $50,671 | 181 | 22 | $50,671 | 0.12 | 11 | 2 | $4,926 | 18.2% | 10/31/2025 |
| | Home | 2 | 1 | $1,591 | 2 | 1 | $1,591 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 14 | 3 | $3,171 | 12 | 2 | $2,065 | 0.17 | 2 | 1 | $1,022 | 50.0% | 10/31/2025 |
| | Motor Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 3 | 0 | $0 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 2 | 2 | $1,003 | 1 | 1 | $555 | 1.00 | 1 | 1 | $555 | 100.0% | 10/31/2025 |
| | **Total** | **205** | **28** | **$56,436** | **202** | **26** | **54,882** | **0.13** | **14** | **4** | **$6,503** | **28.6%** | |
| **Grand Total** | | **250** | **30** | **$59,418** | **246** | **28** | **57,864** | **0.11** | **22** | **5** | **$7,427** | **22.7%** | |

**CO**

# State Summary

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | -100.0% | 5.0% | $0 | -100.0% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $124,122 | 111.9% | 34.8% | $112,997 | 117.4% | $11,202 | 95.6% | 54 | 54.3% | 66.7% | $2,299 | 10/31/2025 |
| | **Total** | **$124,122** | **39.7%** | **32.7%** | **$112,997** | **37.4%** | **$11,202** | **95.6%** | **54** | **50.0%** | **65.9%** | **$2,299** | |
| Foremost Choice | Dwelling Fire | $115,694 | 25.6% | 27.7% | $80,603 | -15.3% | $16,003 | 5.4% | 41 | -2.4% | 67.2% | $2,822 | 10/31/2025 |
| | Home | $108,284 | 12.8% | 33.1% | $88,316 | -4.2% | $1,865 | 919.1% | 36 | -14.3% | 85.7% | $3,008 | 10/31/2025 |
| | Marine | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $29,429 | 7.0% | 42.8% | $26,175 | -2.6% | $0 | -100.0% | 17 | 6.3% | 106.3% | $1,731 | 10/31/2025 |
| | Motor Home | $2,575 | 69.1% | 8.8% | $989 | 9999.9% | $0 | 0.0% | 2 | 100.0% | 100.0% | $1,288 | 10/31/2025 |
| | Motorcycle | $1,083 | 3.0% | 2.1% | $1,083 | 3.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Off-Road Veh | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $0 | 10/31/2025 |
| | Rental M.H. | $9,740 | 87.6% | 24.6% | $6,654 | 28.2% | $0 | 0.0% | 6 | 50.0% | 100.0% | $1,623 | 10/31/2025 |
| | Travel Trailer | $283 | -1279.2% | -56.2% | $283 | -1279.2% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $283 | 10/31/2025 |
| | **Total** | **$267,088** | **19.5%** | **31.5%** | **$204,103** | **-7.5%** | **$17,868** | **11.6%** | **104** | **-1.9%** | **80.6%** | **$2,568** | |
| **Grand Total** | | **$391,210** | **25.3%** | **31.9%** | **$317,100** | **4.7%** | **$29,070** | **33.7%** | **158** | **11.3%** | **74.9%** | **$2,476** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 7 | 0 | $0 | 6 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 533 | 46 | $61,049 | 448 | 42 | $54,073 | 0.09 | 36 | 5 | $6,588 | 13.9% | 10/31/2025 |
| | **Total** | **540** | **46** | **$61,049** | **454** | **42** | **54,073** | **0.09** | **36** | **5** | **$6,588** | **13.9%** | |
| Foremost Choice | Dwelling Fire | 127 | 19 | $59,329 | 112 | 15 | $46,883 | 0.13 | 12 | 2 | $4,896 | 16.7% | 10/31/2025 |
| | Home | 2 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 11 | 0 | $0 | 8 | 0 | $0 | 0.00 | 3 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 3 | 1 | $989 | 3 | 1 | $989 | 0.33 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 4 | 2 | $2,914 | 1 | 1 | $1,527 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 3 | 1 | $283 | 3 | 1 | $283 | 0.33 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **152** | **23** | **$63,515** | **130** | **18** | **49,682** | **0.14** | **15** | **2** | **$4,896** | **13.3%** | |
| **Grand Total** | | **692** | **69** | **$124,564** | **584** | **60** | **103,755** | **0.10** | **51** | **7** | **$11,484** | **13.7%** | |

**CT**

# State Summary

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $32,316 | -11.4% | 32.3% | $29,037 | 4.1% | $163 | -96.3% | 3 | -25.0% | 25.0% | $10,772 | 10/31/2025 |
| | **Total** | **$32,316** | **-11.4%** | **32.3%** | **$29,037** | **4.1%** | **$163** | **-96.3%** | **3** | **-25.0%** | **25.0%** | **$10,772** | |
| Foremost Choice | Dwelling Fire | $213,099 | 48.2% | 8.4% | $165,317 | 37.8% | $26,191 | 786.3% | 69 | 25.5% | 61.1% | $3,088 | 10/31/2025 |
| | Home | $1,003 | 9.6% | 4.1% | $1,003 | 9.6% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,003 | 10/31/2025 |
| | Marine | $1,282 | 93.9% | 20.6% | $1,282 | 93.9% | $0 | 0.0% | 4 | 33.3% | 100.0% | $321 | 10/31/2025 |
| | Mobile Home | $58,480 | 17.8% | 15.3% | $50,709 | 14.8% | $4,016 | 63.6% | 51 | -7.3% | 73.9% | $1,147 | 10/31/2025 |
| | Motor Home | $2,095 | 40.0% | 17.5% | $2,095 | 40.0% | $0 | 0.0% | 2 | 100.0% | 100.0% | $1,048 | 10/31/2025 |
| | Motorcycle | $9,162 | -8.8% | 123.4% | $8,929 | -2.9% | $873 | 30.1% | 17 | -5.6% | 73.9% | $539 | 10/31/2025 |
| | Off-Road Veh | $326 | -65.7% | -13.8% | $126 | -85.5% | $0 | 0.0% | 2 | -50.0% | 40.0% | $163 | 10/31/2025 |
| | Rental M.H. | $2,250 | -11.1% | 9.0% | $1,212 | -22.7% | $0 | 0.0% | 2 | -33.3% | 66.7% | $1,125 | 10/31/2025 |
| | Travel Trailer | $475 | -79.1% | 0.3% | ($163) | -108.8% | $0 | 0.0% | 2 | -50.0% | 40.0% | $238 | 10/31/2025 |
| | **Total** | **$288,172** | **35.8%** | **14.5%** | **$230,510** | **27.5%** | **$31,080** | **411.1%** | **150** | **4.2%** | **66.7%** | **$1,921** | |
| **Grand Total** | | **$320,488** | **28.8%** | **16.9%** | **$259,547** | **24.4%** | **$31,243** | **198.9%** | **153** | **3.4%** | **64.6%** | **$2,095** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 91 | 8 | $32,352 | 80 | 7 | $26,489 | 0.09 | 4 | 1 | $1,601 | 25.0% | 10/31/2025 |
| | **Total** | **91** | **8** | **$32,352** | **80** | **7** | **26,489** | **0.09** | **4** | **1** | **$1,601** | **25.0%** | |
| Foremost Choice | Dwelling Fire | 277 | 58 | $175,567 | 239 | 46 | $135,801 | 0.19 | 22 | 2 | $7,413 | 9.1% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 6 | 1 | $601 | 6 | 1 | $601 | 0.17 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 28 | 14 | $16,843 | 26 | 13 | $15,658 | 0.50 | 2 | 2 | $2,577 | 100.0% | 10/31/2025 |
| | Motor Home | 3 | 1 | $861 | 2 | 1 | $861 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 12 | 5 | $2,659 | 12 | 5 | $2,659 | 0.42 | 3 | 1 | $873 | 33.3% | 10/31/2025 |
| | Off-Road Veh | 3 | 1 | $171 | 2 | 1 | $171 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 3 | 0 | $0 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 3 | 1 | $462 | 2 | 0 | $0 | 0.00 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **335** | **81** | **$197,164** | **292** | **67** | **155,751** | **0.23** | **31** | **5** | **$10,863** | **16.1%** | |
| **Grand Total** | | **426** | **89** | **$229,516** | **372** | **74** | **182,240** | **0.20** | **35** | **6** | **$12,464** | **17.1%** | |

**DE**

# State Summary

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $11,201 | 9999.9% | 2.2% | $887 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 50.0% | $11,201 | 10/31/2025 |
| | **Total** | **$11,201** | **9999.9%** | **2.2%** | **$887** | **9999.9%** | **$0** | **0.0%** | **1** | **9999.9%** | **50.0%** | **$11,201** | |
| Foremost Choice | Dwelling Fire | $297,940 | 53.7% | 18.6% | $254,201 | 38.9% | $15,686 | -19.6% | 172 | 37.6% | 82.7% | $1,732 | 10/31/2025 |
| | Home | $241,871 | 91.8% | 39.6% | $209,898 | 82.0% | $30,090 | 50.6% | 190 | 86.3% | 89.6% | $1,273 | 10/31/2025 |
| | Marine | $2,851 | 2.8% | 20.1% | $2,218 | 3.6% | $0 | 0.0% | 6 | 20.0% | 100.0% | $475 | 10/31/2025 |
| | Mobile Home | $118,420 | 32.2% | 26.8% | $99,392 | 23.8% | $4,777 | 106.2% | 95 | 14.5% | 90.5% | $1,247 | 10/31/2025 |
| | Motor Home | $0 | -100.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $16,633 | 83.6% | 41.0% | $14,279 | 31.0% | ($631) | 66.1% | 13 | 44.4% | 72.2% | $1,279 | 10/31/2025 |
| | Off-Road Veh | $2,559 | 7.3% | 4.5% | $2,559 | 10.8% | $168 | 78.7% | 25 | 25.0% | 96.2% | $102 | 10/31/2025 |
| | Rental M.H. | $4,759 | 21.2% | 35.5% | $4,759 | 21.2% | $0 | 0.0% | 5 | 0.0% | 100.0% | $952 | 10/31/2025 |
| | Travel Trailer | $8,543 | 5.3% | 26.5% | $8,543 | 5.3% | $8 | 9999.9% | 15 | 25.0% | 88.2% | $570 | 10/31/2025 |
| | **Total** | **$693,576** | **59.2%** | **27.4%** | **$595,849** | **46.7%** | **$50,098** | **20.7%** | **521** | **44.3%** | **87.3%** | **$1,331** | |
| **Grand Total** | | **$704,777** | **61.8%** | **26.9%** | **$596,736** | **46.9%** | **$50,098** | **20.7%** | **522** | **44.6%** | **87.1%** | **$1,350** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 97 | 2 | $6,842 | 79 | 0 | $0 | 0.00 | 8 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **97** | **2** | **$6,842** | **79** | **0** | **0** | **0.00** | **8** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 457 | 83 | $184,688 | 372 | 66 | $151,766 | 0.18 | 32 | 7 | $13,546 | 21.9% | 10/31/2025 |
| | Home | 318 | 110 | $108,200 | 251 | 88 | $86,107 | 0.35 | 20 | 8 | $7,943 | 40.0% | 10/31/2025 |
| | Marine | 3 | 1 | $182 | 3 | 1 | $182 | 0.33 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 82 | 22 | $24,633 | 75 | 20 | $22,022 | 0.27 | 10 | 2 | $2,167 | 20.0% | 10/31/2025 |
| | Motor Home | 5 | 0 | $0 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 27 | 9 | $9,522 | 21 | 6 | $6,864 | 0.29 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 10 | 6 | $489 | 10 | 6 | $489 | 0.60 | 1 | 1 | $75 | 100.0% | 10/31/2025 |
| | Rental M.H. | 2 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 15 | 5 | $2,860 | 13 | 5 | $2,860 | 0.38 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **919** | **236** | **$330,574** | **749** | **192** | **270,290** | **0.26** | **64** | **18** | **$23,731** | **28.1%** | |
| **Grand Total** | | **1,016** | **238** | **$337,416** | **828** | **192** | **270,290** | **0.23** | **72** | **18** | **$23,731** | **25.0%** | |

**FL**

# State Summary

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 999.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $642,910 | 18.8% | 69.4% | $539,734 | 12.3% | $63,434 | 15.0% | 147 | -0.7% | 55.9% | $4,374 | 10/31/2025 |
| | **Total** | **$642,910** | **18.8%** | **69.4%** | **$539,734** | **12.3%** | **$63,434** | **15.0%** | **147** | **-0.7%** | **55.9%** | **$4,374** | |
| Foremost Choice | Dwelling Fire | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Marine | $4,552 | -12.9% | 38.0% | $995 | -31.0% | $380 | 28.4% | 10 | -9.1% | 83.3% | $455 | 10/31/2025 |
| | Mobile Home | $549,349 | -0.3% | 54.1% | $446,957 | -3.0% | $32,302 | -20.4% | 202 | -14.0% | 86.0% | $2,720 | 10/31/2025 |
| | Motor Home | $2,094 | 12.1% | 13.5% | $1,904 | 13.5% | $0 | 0.0% | 3 | 0.0% | 100.0% | $698 | 10/31/2025 |
| | Motorcycle | $357 | -4.5% | 3.3% | $205 | -13.5% | $0 | 0.0% | 2 | 0.0% | 100.0% | $179 | 10/31/2025 |
| | Off-Road Veh | $3,604 | -25.6% | 1.7% | $2,543 | -36.7% | $349 | 2.3% | 14 | -22.2% | 77.8% | $257 | 10/31/2025 |
| | Rental M.H. | $11,184 | -37.2% | 30.0% | $8,998 | -39.0% | $0 | -100.0% | 14 | -44.0% | 56.0% | $799 | 10/31/2025 |
| | Travel Trailer | $5,725 | -62.9% | -0.8% | $4,275 | -68.1% | $0 | 0.0% | 7 | -46.2% | 53.8% | $818 | 10/31/2025 |
| | **Total** | **$576,865** | **-3.3%** | **51.6%** | **$465,877** | **-6.1%** | **$33,031** | **-22.1%** | **252** | **-17.9%** | **81.8%** | **$2,289** | |
| **Grand Total** | | **$1,219,775** | **7.2%** | **60.7%** | **$1,005,611** | **2.9%** | **$96,465** | **-1.2%** | **399** | **-12.3%** | **69.9%** | **$3,057** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 12 | 0 | $0 | 12 | 0 | $0 | 0.00 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 6,063 | 115 | $244,713 | 4,961 | 95 | $202,701 | 0.02 | 480 | 14 | $28,466 | 2.9% | 10/31/2025 |
| | **Total** | **6,075** | **115** | **$244,713** | **4,973** | **95** | **202,701** | **0.02** | **482** | **14** | **$28,466** | **2.9%** | |
| Foremost Choice | Dwelling Fire | 9 | 0 | $0 | 9 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 2 | 1 | $477 | 2 | 1 | $477 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 13 | 0 | $0 | 10 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **25** | **1** | **$477** | **22** | **1** | **477** | **0.05** | **1** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **6,100** | **116** | **$245,190** | **4,995** | **96** | **203,178** | **0.02** | **483** | **14** | **$28,466** | **2.9%** | |

**GA**

# State Summary

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $2,535 | -56.3% | -184.0% | $2,535 | -67.2% | $0 | -100.0% | 1 | -50.0% | 50.0% | $2,535 | 10/31/2025 |
| | Personal Auto | $153,894 | 62.0% | 71.4% | $132,440 | 52.4% | $20,151 | -14.2% | 35 | 59.1% | 53.8% | $4,397 | 10/31/2025 |
| | **Total** | **$156,429** | **55.2%** | **56.9%** | **$134,975** | **42.6%** | **$20,151** | **-14.3%** | **36** | **50.0%** | **53.7%** | **$4,345** | |
| Foremost Choice | Dwelling Fire | $1,499,852 | 31.6% | 15.5% | $1,292,500 | 32.5% | $95,668 | -0.4% | 824 | 13.2% | 80.7% | $1,820 | 10/31/2025 |
| | Home | $385,082 | 0.0% | 39.5% | $341,572 | 1.5% | $27,169 | 10.4% | 173 | -7.0% | 87.8% | $2,226 | 10/31/2025 |
| | Marine | $46,237 | 33.2% | 32.0% | $44,834 | 34.2% | ($228) | -279.5% | 66 | 15.8% | 95.7% | $701 | 10/31/2025 |
| | Mobile Home | $783,609 | 0.1% | 23.8% | $662,087 | 3.5% | $47,817 | 5.5% | 474 | -3.3% | 88.8% | $1,653 | 10/31/2025 |
| | Motor Home | $22,481 | -26.5% | 7.6% | $14,595 | -26.9% | $4,274 | 218.0% | 15 | -11.8% | 78.9% | $1,499 | 10/31/2025 |
| | Motorcycle | $47,113 | -6.2% | 80.1% | $44,723 | -3.9% | $4,706 | 122.3% | 70 | 2.9% | 80.5% | $673 | 10/31/2025 |
| | Off-Road Veh | $21,221 | -10.2% | 3.7% | $19,277 | -7.4% | $861 | -49.7% | 107 | -3.6% | 84.3% | $198 | 10/31/2025 |
| | Rental M.H. | $236,334 | -0.9% | 31.3% | $184,383 | -13.4% | $8,566 | -58.4% | 209 | -4.1% | 81.6% | $1,131 | 10/31/2025 |
| | Travel Trailer | $27,833 | 75.3% | 382.0% | $23,094 | 47.9% | $2,523 | 108.2% | 49 | 32.4% | 80.3% | $568 | 10/31/2025 |
| | **Total** | **$3,069,762** | **13.7%** | **26.4%** | **$2,627,065** | **14.2%** | **$191,356** | **-0.9%** | **1,987** | **3.9%** | **83.8%** | **$1,545** | |
| **Grand Total** | | **$3,226,191** | **15.2%** | **27.9%** | **$2,762,040** | **15.3%** | **$211,507** | **-2.3%** | **2,023** | **4.5%** | **83.0%** | **$1,595** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 15 | 0 | $0 | 14 | 0 | $0 | 0.00 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 5,775 | 43 | $90,617 | 5,062 | 40 | $86,630 | 0.01 | 542 | 6 | $11,331 | 1.1% | 10/31/2025 |
| | **Total** | **5,790** | **43** | **$90,617** | **5,076** | **40** | **86,630** | **0.01** | **544** | **6** | **$11,331** | **1.1%** | |
| Foremost Choice | Dwelling Fire | 1,861 | 293 | $643,169 | 1,562 | 252 | $558,965 | 0.16 | 125 | 23 | $49,584 | 18.4% | 10/31/2025 |
| | Home | 71 | 11 | $23,317 | 64 | 9 | $19,157 | 0.14 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 28 | 12 | $11,561 | 28 | 12 | $11,561 | 0.43 | 4 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 230 | 44 | $79,187 | 203 | 39 | $64,243 | 0.19 | 16 | 2 | $3,931 | 12.5% | 10/31/2025 |
| | Motor Home | 11 | 2 | $2,686 | 11 | 2 | $2,686 | 0.18 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 62 | 19 | $10,851 | 53 | 16 | $9,562 | 0.30 | 11 | 4 | $1,811 | 36.4% | 10/31/2025 |
| | Off-Road Veh | 38 | 16 | $3,198 | 34 | 14 | $2,427 | 0.41 | 5 | 1 | $234 | 20.0% | 10/31/2025 |
| | Rental M.H. | 102 | 38 | $44,123 | 77 | 30 | $37,701 | 0.39 | 11 | 7 | $9,593 | 63.6% | 10/31/2025 |
| | Travel Trailer | 49 | 24 | $15,708 | 42 | 20 | $10,898 | 0.48 | 2 | 2 | $956 | 100.0% | 10/31/2025 |
| | **Total** | **2,452** | **459** | **$833,800** | **2,074** | **394** | **717,200** | **0.19** | **176** | **39** | **$66,109** | **22.2%** | |
| **Grand Total** | | **8,242** | **502** | **$924,417** | **7,150** | **434** | **803,830** | **0.06** | **720** | **45** | **$77,440** | **6.3%** | |

**ID**

# State Summary

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Home | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Marine | $194 | 9999.9% | 16.1% | $0 | 0.0% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $194 | 10/31/2025 |
| | Mobile Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motor Home | $1,076 | 9999.9% | 17.4% | $1,076 | 9999.9% | $0 | 0.0% | 2 | 9999.9% | 100.0% | $538 | 10/31/2025 |
| | Motorcycle | $348 | 123.1% | 5.7% | $178 | 14.1% | $0 | 0.0% | 2 | 100.0% | 100.0% | $174 | 10/31/2025 |
| | Rental M.H. | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Travel Trailer | $422 | -50.5% | -372.5% | $422 | -50.5% | $0 | 0.0% | 2 | -33.3% | 66.7% | $211 | 10/31/2025 |
| | **Total** | **$2,040** | **301.6%** | **-148.5%** | **$1,676** | **229.9%** | **$0** | **0.0%** | **7** | **75.0%** | **87.5%** | **$291** | |
| **Grand Total** | | **$2,040** | **301.6%** | **-148.5%** | **$1,676** | **229.9%** | **$0** | **0.0%** | **7** | **75.0%** | **87.5%** | **$291** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **1** | **0** | **$0** | **1** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 4 | 0 | $0 | 4 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 1 | 1 | $194 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 1 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 3 | 2 | $1,076 | 3 | 2 | $1,076 | 0.67 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 1 | 1 | $170 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **11** | **4** | **$1,440** | **8** | **2** | **1,076** | **0.25** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **12** | **4** | **$1,440** | **9** | **2** | **1,076** | **0.22** | **0** | **0** | **$0** | **0.0%** | |

**IL**

# State Summary

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $42,301 | 92.3% | 2.3% | $43,066 | 95.7% | ($344) | -110.6% | 9 | 0.0% | 47.4% | $4,700 | 10/31/2025 |
| | **Total** | **$42,301** | **92.3%** | **2.3%** | **$43,066** | **95.7%** | **($344)** | **-110.6%** | **9** | **0.0%** | **47.4%** | **$4,700** | |
| Foremost Choice | Dwelling Fire | $36,656 | 96.7% | 21.7% | $32,900 | 101.5% | $12,714 | 1309.5% | 21 | 110.0% | 80.8% | $1,746 | 10/31/2025 |
| | Home | $22,746 | 227.1% | 22.9% | $20,868 | 295.5% | $3,132 | 9999.9% | 9 | 125.0% | 69.2% | $2,527 | 10/31/2025 |
| | Mobile Home | $9,288 | 19.1% | 95.8% | $5,003 | 20.9% | $0 | -100.0% | 8 | 33.3% | 100.0% | $1,161 | 10/31/2025 |
| | Motorcycle | $678 | 0.0% | 2.5% | $678 | 0.0% | $0 | 0.0% | 2 | 0.0% | 100.0% | $339 | 10/31/2025 |
| | Off-Road Veh | $503 | -6.5% | 1.8% | $503 | -6.5% | $0 | 0.0% | 1 | 0.0% | 100.0% | $503 | 10/31/2025 |
| | Travel Trailer | $363 | -2.9% | 16.6% | $363 | -2.9% | $0 | 0.0% | 1 | 0.0% | 100.0% | $363 | 10/31/2025 |
| | **Total** | **$70,234** | **100.8%** | **36.0%** | **$60,315** | **120.7%** | **$15,846** | **836.0%** | **42** | **75.0%** | **82.4%** | **$1,672** | |
| **Grand Total** | | **$112,535** | **97.5%** | **19.7%** | **$103,381** | **109.6%** | **$15,502** | **213.8%** | **51** | **54.5%** | **72.9%** | **$2,207** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 175 | 10 | $32,434 | 127 | 10 | $32,434 | 0.08 | 9 | 1 | $2,971 | 11.1% | 10/31/2025 |
| | **Total** | **175** | **10** | **$32,434** | **127** | **10** | **32,434** | **0.08** | **9** | **1** | **$2,971** | **11.1%** | |
| Foremost Choice | Dwelling Fire | 110 | 16 | $21,542 | 98 | 15 | $20,295 | 0.15 | 15 | 9 | $12,247 | 60.0% | 10/31/2025 |
| | Home | 42 | 9 | $20,161 | 38 | 9 | $20,161 | 0.24 | 3 | 1 | $3,132 | 33.3% | 10/31/2025 |
| | Mobile Home | 14 | 2 | $1,532 | 14 | 2 | $1,532 | 0.14 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **168** | **27** | **$43,235** | **152** | **26** | **41,988** | **0.17** | **19** | **10** | **$15,379** | **52.6%** | |
| **Grand Total** | | **343** | **37** | **$75,669** | **279** | **36** | **74,422** | **0.13** | **28** | **11** | **$18,350** | **39.3%** | |

**IN**

# State Summary

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $13,121 | -15.7% | 1.7% | $8,420 | -35.9% | $67 | -77.8% | 3 | -40.0% | 33.3% | $4,374 | 10/31/2025 |
| | **Total** | **$13,121** | **-15.7%** | **1.7%** | **$8,420** | **-35.9%** | **$67** | **-77.8%** | **3** | **-40.0%** | **33.3%** | **$4,374** | |
| Foremost Choice | Dwelling Fire | $52,107 | 139.6% | 35.5% | $48,717 | 140.6% | $3,448 | -270.6% | 39 | 129.4% | 92.9% | $1,336 | 10/31/2025 |
| | Home | $126,641 | 257.7% | 17.5% | $119,623 | 532.0% | $21,813 | 142.1% | 79 | 364.7% | 87.8% | $1,603 | 10/31/2025 |
| | Mobile Home | $28,056 | 66.4% | 15.4% | $23,997 | 75.8% | $4,812 | 37.8% | 20 | 66.7% | 83.3% | $1,403 | 10/31/2025 |
| | Motor Home | $1,214 | 9999.9% | 17.4% | $1,214 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $1,214 | 10/31/2025 |
| | Motorcycle | ($398) | -121.6% | -5.5% | ($398) | -121.6% | $0 | -100.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Off-Road Veh | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $5,830 | 59.5% | 14.5% | $4,902 | 61.0% | $0 | 0.0% | 4 | 33.3% | 80.0% | $1,458 | 10/31/2025 |
| | Travel Trailer | $3,417 | 9999.9% | 22.0% | $1,964 | 9999.9% | $0 | 0.0% | 2 | 9999.9% | 100.0% | $1,709 | 10/31/2025 |
| | **Total** | **$216,867** | **172.8%** | **21.6%** | **$200,019** | **246.6%** | **$30,073** | **207.9%** | **145** | **184.3%** | **86.8%** | **$1,496** | |
| **Grand Total** | | **$229,988** | **141.9%** | **19.4%** | **$208,439** | **194.2%** | **$30,140** | **199.3%** | **148** | **164.3%** | **84.1%** | **$1,554** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 1,052 | 4 | $5,329 | 919 | 3 | $4,272 | 0.00 | 79 | 1 | $664 | 1.3% | 10/31/2025 |
| | **Total** | **1,052** | **4** | **$5,329** | **919** | **3** | **4,272** | **0.00** | **79** | **1** | **$664** | **1.3%** | |
| Foremost Choice | Dwelling Fire | 186 | 25 | $32,455 | 171 | 25 | $32,455 | 0.15 | 21 | 3 | $5,511 | 14.3% | 10/31/2025 |
| | Home | 268 | 73 | $110,689 | 260 | 72 | $107,763 | 0.28 | 33 | 8 | $12,656 | 24.2% | 10/31/2025 |
| | Mobile Home | 58 | 12 | $14,104 | 53 | 11 | $13,420 | 0.21 | 5 | 1 | $563 | 20.0% | 10/31/2025 |
| | Motor Home | 1 | 1 | $1,214 | 1 | 1 | $1,214 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 13 | 1 | $1,001 | 12 | 1 | $1,001 | 0.08 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 5 | 0 | $0 | 4 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 4 | 2 | $2,574 | 2 | 1 | $1,646 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 7 | 2 | $1,963 | 5 | 1 | $510 | 0.20 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **542** | **116** | **$164,000** | **508** | **112** | **158,009** | **0.22** | **60** | **12** | **$18,730** | **20.0%** | |
| **Grand Total** | | **1,594** | **120** | **$169,329** | **1,427** | **115** | **162,281** | **0.08** | **139** | **13** | **$19,394** | **9.4%** | |

**KS**

# State Summary

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $21,286 | -54.5% | 211.9% | $17,211 | -61.0% | ($406) | -17.3% | 8 | -33.3% | 25.0% | $2,661 | 10/31/2025 |
| | **Total** | **$21,286** | **-54.5%** | **211.9%** | **$17,211** | **-61.0%** | **($406)** | **-17.3%** | **8** | **-33.3%** | **25.0%** | **$2,661** | |
| Foremost Choice | Dwelling Fire | $85,892 | 234.6% | 22.2% | $85,892 | 268.9% | $1,965 | -44.8% | 31 | 520.0% | 83.8% | $2,771 | 10/31/2025 |
| | Home | $0 | -100.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$85,892** | **267.1%** | **22.2%** | **$85,892** | **268.9%** | **$1,965** | **-44.8%** | **31** | **520.0%** | **83.8%** | **$2,771** | |
| **Grand Total** | | **$107,178** | **52.8%** | **87.7%** | **$103,103** | **52.9%** | **$1,559** | **-49.2%** | **39** | **129.4%** | **56.5%** | **$2,748** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 846 | 20 | $25,881 | 834 | 20 | $25,881 | 0.02 | 142 | 2 | $2,104 | 1.4% | 10/31/2025 |
| | **Total** | **846** | **20** | **$25,881** | **834** | **20** | **25,881** | **0.02** | **142** | **2** | **$2,104** | **1.4%** | |
| Foremost Choice | Dwelling Fire | 129 | 32 | $75,583 | 118 | 32 | $75,583 | 0.27 | 8 | 2 | $1,965 | 25.0% | 10/31/2025 |
| | Home | 1 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **132** | **32** | **$75,583** | **120** | **32** | **75,583** | **0.27** | **8** | **2** | **$1,965** | **25.0%** | |
| **Grand Total** | | **978** | **52** | **$101,464** | **954** | **52** | **101,464** | **0.05** | **150** | **4** | **$4,069** | **2.7%** | |

**KY**

# State Summary

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $572 | -94.8% | 15.7% | $1,708 | -83.0% | $0 | 0.0% | 2 | -77.8% | 22.2% | $286 | 10/31/2025 |
| | Marine | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $23,626 | 34.5% | 187.9% | $21,787 | 26.3% | $1,243 | -48.3% | 15 | -11.8% | 88.2% | $1,575 | 10/31/2025 |
| | Motorcycle | $180 | 0.0% | 2.3% | $180 | 0.0% | $90 | 0.0% | 2 | 0.0% | 100.0% | $90 | 10/31/2025 |
| | Rental M.H. | $558 | 9.8% | 17.5% | $558 | 9.8% | $0 | 0.0% | 1 | 0.0% | 100.0% | $558 | 10/31/2025 |
| | Travel Trailer | $78 | -87.0% | 8033.4% | ($492) | 0.0% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$25,014** | **-16.4%** | **243.2%** | **$23,741** | **-15.5%** | **$1,333** | **-46.5%** | **20** | **-33.3%** | **66.7%** | **$1,251** | |
| **Grand Total** | | **$25,014** | **-16.4%** | **243.2%** | **$23,741** | **-15.5%** | **$1,333** | **-46.5%** | **20** | **-33.3%** | **66.7%** | **$1,251** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 6 | 0 | $0 | 6 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **10** | **0** | **$0** | **10** | **0** | **0** | **0.00** | **2** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **10** | **0** | **$0** | **10** | **0** | **0** | **0.00** | **2** | **0** | **$0** | **0.0%** | |

**MD**

# State Summary

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $4,191 | -32.2% | 45.5% | $3,327 | -32.0% | $0 | -100.0% | 2 | -33.3% | 66.7% | $2,096 | 10/31/2025 |
| | **Total** | **$4,191** | **-32.2%** | **45.5%** | **$3,327** | **-32.0%** | **$0** | **-100.0%** | **2** | **-33.3%** | **66.7%** | **$2,096** | |
| Foremost Choice | Dwelling Fire | $246,609 | 18.1% | 22.7% | $218,851 | 11.9% | $23,919 | 36.0% | 124 | 2.5% | 83.2% | $1,989 | 10/31/2025 |
| | Home | $6,118 | 8.0% | 9.8% | $4,967 | -12.4% | $4,119 | 4.7% | 3 | 0.0% | 75.0% | $2,039 | 10/31/2025 |
| | Marine | $305 | 1.7% | -35.0% | $305 | 1.7% | $0 | -100.0% | 1 | 0.0% | 100.0% | $305 | 10/31/2025 |
| | Mobile Home | $33,115 | 9.3% | 17.6% | $26,272 | 7.1% | $942 | -21.9% | 30 | -3.2% | 88.2% | $1,104 | 10/31/2025 |
| | Motor Home | $1,474 | 0.3% | 12.8% | $1,474 | 0.3% | $0 | 0.0% | 2 | 0.0% | 100.0% | $737 | 10/31/2025 |
| | Motorcycle | $970 | -40.9% | -2.3% | $970 | -40.9% | $1,054 | -19.0% | 2 | 0.0% | 100.0% | $485 | 10/31/2025 |
| | Off-Road Veh | $510 | -4.0% | -6.8% | $225 | 0.0% | $0 | 0.0% | 5 | 0.0% | 83.3% | $102 | 10/31/2025 |
| | Rental M.H. | $1,452 | 9999.9% | 22.8% | $1,452 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $1,452 | 10/31/2025 |
| | Travel Trailer | $1,281 | 6.2% | 16.5% | $1,281 | 6.2% | ($405) | -137.1% | 2 | 0.0% | 66.7% | $641 | 10/31/2025 |
| | **Total** | **$291,834** | **16.8%** | **21.6%** | **$255,797** | **10.9%** | **$29,629** | **16.6%** | **170** | **1.8%** | **84.2%** | **$1,717** | |
| **Grand Total** | | **$296,025** | **15.6%** | **22.0%** | **$259,124** | **10.0%** | **$29,629** | **14.4%** | **172** | **1.2%** | **83.9%** | **$1,721** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 866 | 0 | $0 | 665 | 0 | $0 | 0.00 | 87 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **866** | **0** | **$0** | **665** | **0** | **0** | **0.00** | **87** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 421 | 28 | $59,482 | 353 | 21 | $50,215 | 0.06 | 43 | 3 | $9,695 | 7.0% | 10/31/2025 |
| | Home | 49 | 1 | $1,151 | 40 | 0 | $0 | 0.00 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 12 | 3 | $3,209 | 11 | 3 | $3,209 | 0.27 | 2 | 1 | $942 | 50.0% | 10/31/2025 |
| | Motor Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 1 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 1 | 1 | $75 | 1 | 1 | $75 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 2 | 1 | $1,452 | 2 | 1 | $1,452 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 2 | 1 | $480 | 2 | 1 | $480 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **488** | **35** | **$65,849** | **409** | **27** | **55,431** | **0.07** | **47** | **4** | **$10,637** | **8.5%** | |
| **Grand Total** | | **1,354** | **35** | **$65,849** | **1,074** | **27** | **55,431** | **0.03** | **134** | **4** | **$10,637** | **3.0%** | |

**ME**

# State Summary

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $5,922 | 3.9% | 10.8% | $5,922 | 3.9% | $2,554 | 4.5% | 3 | 0.0% | 100.0% | $1,974 | 10/31/2025 |
| | Home | ($4,870) | -173.5% | -14.2% | ($1,467) | -122.1% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Marine | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | ($181) | -107.3% | 26.7% | $997 | -59.6% | $0 | 0.0% | 1 | -50.0% | 50.0% | ($181) | 10/31/2025 |
| | Motorcycle | ($126) | -148.6% | -63.9% | $0 | -100.0% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $3,724 | -6.0% | 13.5% | $3,724 | 2.4% | $348 | 2.1% | 2 | 0.0% | 100.0% | $1,862 | 10/31/2025 |
| | **Total** | **$4,469** | **-76.5%** | **11.5%** | **$9,176** | **-50.9%** | **$2,902** | **4.2%** | **6** | **-45.5%** | **54.5%** | **$745** | |
| **Grand Total** | | **$4,469** | **-76.5%** | **11.5%** | **$9,176** | **-50.9%** | **$2,902** | **4.2%** | **6** | **-45.5%** | **54.5%** | **$745** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 1 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **1** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 16 | 0 | $0 | 14 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 5 | 0 | $0 | 4 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 1 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **23** | **0** | **$0** | **19** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **24** | **0** | **$0** | **19** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

**MI**

# State Summary

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $46,570 | 11.7% | 8.4% | $43,227 | 21.9% | $6,686 | 140.2% | 45 | 36.4% | 83.3% | $1,035 | 10/31/2025 |
| | Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $2,810 | 2.4% | 11.4% | $2,018 | 1.6% | $0 | 0.0% | 3 | 0.0% | 100.0% | $937 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $1,147 | 12.8% | 13.5% | $1,147 | 12.8% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,147 | 10/31/2025 |
| | Travel Trailer | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$50,527** | **11.1%** | **8.6%** | **$46,392** | **20.7%** | **$6,686** | **140.2%** | **49** | **32.4%** | **84.5%** | **$1,031** | |
| **Grand Total** | | **$50,527** | **11.1%** | **8.6%** | **$46,392** | **20.7%** | **$6,686** | **140.2%** | **49** | **32.4%** | **84.5%** | **$1,031** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 10 | 0 | $0 | 7 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **10** | **0** | **$0** | **7** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 41 | 21 | $23,446 | 37 | 20 | $22,787 | 0.54 | 6 | 4 | $3,341 | 66.7% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 3 | 0 | $0 | 2 | 0 | $0 | 0.00 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **44** | **21** | **$23,446** | **39** | **20** | **22,787** | **0.51** | **8** | **4** | **$3,341** | **50.0%** | |
| **Grand Total** | | **54** | **21** | **$23,446** | **46** | **20** | **22,787** | **0.43** | **8** | **4** | **$3,341** | **50.0%** | |

**MN**

# State Summary

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $2,390 | -66.5% | 0.3% | $2,390 | -61.7% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$2,390** | **-66.5%** | **0.3%** | **$2,390** | **-61.7%** | **$0** | **0.0%** | **0** | **-100.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $44,921 | 258.0% | 174.8% | $44,921 | 258.0% | $6,271 | -562.1% | 15 | 150.0% | 93.8% | $2,995 | 10/31/2025 |
| | Home | $23,932 | -17.9% | 24.6% | $16,058 | -32.6% | $4,561 | 34984.6% | 10 | -9.1% | 90.9% | $2,393 | 10/31/2025 |
| | Marine | $789 | -9.6% | 1.4% | $789 | -9.6% | $0 | 0.0% | 1 | 0.0% | 100.0% | $789 | 10/31/2025 |
| | Mobile Home | $6,797 | -12.0% | 23.6% | $3,852 | 11.0% | $0 | 0.0% | 6 | 0.0% | 85.7% | $1,133 | 10/31/2025 |
| | Motorcycle | $3,670 | -20.8% | 0.2% | $3,555 | -21.2% | $0 | 0.0% | 6 | 0.0% | 85.7% | $612 | 10/31/2025 |
| | Off-Road Veh | $767 | -34.7% | 2.1% | $767 | -6.9% | $286 | -15.4% | 3 | 0.0% | 75.0% | $256 | 10/31/2025 |
| | Rental M.H. | $0 | -100.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Travel Trailer | $1,838 | 59.0% | 24.3% | $1,838 | 59.0% | $0 | -100.0% | 6 | 20.0% | 100.0% | $306 | 10/31/2025 |
| | **Total** | **$82,714** | **46.2%** | **72.2%** | **$71,780** | **52.0%** | **$11,118** | **-1570.6%** | **47** | **23.7%** | **90.4%** | **$1,760** | |
| **Grand Total** | | **$85,104** | **33.6%** | **67.5%** | **$74,170** | **38.7%** | **$11,118** | **-1570.6%** | **47** | **20.5%** | **88.7%** | **$1,811** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 8 | 0 | $0 | 7 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **8** | **0** | **$0** | **7** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 31 | 10 | $35,158 | 31 | 10 | $35,158 | 0.32 | 4 | 3 | $10,628 | 75.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 2 | 1 | $321 | 2 | 1 | $321 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 3 | 1 | $367 | 3 | 1 | $367 | 0.33 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 2 | 1 | $277 | 2 | 1 | $277 | 0.50 | 1 | 1 | $277 | 100.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 4 | 1 | $334 | 4 | 1 | $334 | 0.25 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **42** | **14** | **$36,457** | **42** | **14** | **36,457** | **0.33** | **5** | **4** | **$10,905** | **80.0%** | |
| **Grand Total** | | **50** | **14** | **$36,457** | **49** | **14** | **36,457** | **0.29** | **5** | **4** | **$10,905** | **80.0%** | |

**MS**

# State Summary

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $64,104 | 70.3% | 57.6% | $59,650 | 80.4% | $4,003 | -31.4% | 16 | -15.8% | 61.5% | $4,007 | 10/31/2025 |
| | **Total** | **$64,104** | **70.3%** | **57.6%** | **$59,650** | **80.4%** | **$4,003** | **-31.4%** | **16** | **-15.8%** | **61.5%** | **$4,007** | |
| Foremost Choice | Dwelling Fire | $126,322 | 41.7% | 38.1% | $108,421 | 48.6% | $8,809 | 171.0% | 64 | 14.3% | 85.3% | $1,974 | 10/31/2025 |
| | Home | $80,881 | 37.1% | 37.4% | $69,166 | 27.0% | $2,616 | -47.1% | 35 | 34.6% | 83.3% | $2,311 | 10/31/2025 |
| | Marine | $503 | 156.6% | 22.5% | $503 | 156.6% | $0 | 0.0% | 2 | 100.0% | 100.0% | $252 | 10/31/2025 |
| | Mobile Home | $123,870 | 7.6% | 29.1% | $110,978 | 11.0% | $7,056 | -57.1% | 66 | 11.9% | 91.7% | $1,877 | 10/31/2025 |
| | Motor Home | $3,344 | 9999.9% | 24.1% | $3,344 | 9999.9% | $0 | 0.0% | 2 | 9999.9% | 0.0% | $1,672 | 10/31/2025 |
| | Motorcycle | $2,284 | 158.7% | 57.7% | $2,284 | 158.7% | $53 | 9999.9% | 6 | 200.0% | 100.0% | $381 | 10/31/2025 |
| | Off-Road Veh | $3,454 | 24.2% | 3.8% | $3,454 | 34.9% | $0 | 0.0% | 17 | 13.3% | 94.4% | $203 | 10/31/2025 |
| | Rental M.H. | $34,415 | 1.8% | 33.6% | $27,681 | 0.6% | $1,032 | -37.8% | 38 | -5.0% | 82.6% | $906 | 10/31/2025 |
| | Travel Trailer | $348 | -89.1% | 9.9% | $99 | -96.9% | $291 | -0.7% | 2 | -50.0% | 50.0% | $174 | 10/31/2025 |
| | **Total** | **$375,421** | **23.4%** | **33.9%** | **$325,930** | **24.5%** | **$19,857** | **-25.4%** | **232** | **14.3%** | **87.5%** | **$1,618** | |
| **Grand Total** | | **$439,525** | **28.6%** | **37.6%** | **$385,580** | **30.8%** | **$23,860** | **-26.4%** | **248** | **11.7%** | **85.2%** | **$1,772** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 690 | 7 | $24,721 | 540 | 6 | $23,502 | 0.01 | 46 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **690** | **7** | **$24,721** | **540** | **6** | **23,502** | **0.01** | **46** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 200 | 19 | $50,647 | 179 | 16 | $44,784 | 0.09 | 9 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 214 | 16 | $36,924 | 197 | 13 | $28,376 | 0.07 | 17 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 5 | 1 | $325 | 5 | 1 | $325 | 0.20 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 93 | 13 | $22,227 | 82 | 11 | $18,001 | 0.13 | 4 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 7 | 4 | $1,017 | 6 | 4 | $1,017 | 0.67 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 8 | 3 | $1,149 | 7 | 2 | $1,074 | 0.29 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 11 | 6 | $6,013 | 11 | 6 | $6,013 | 0.55 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 3 | 0 | $0 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **543** | **62** | **$118,302** | **492** | **53** | **99,590** | **0.11** | **32** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **1,233** | **69** | **$143,023** | **1,032** | **59** | **123,092** | **0.06** | **78** | **0** | **$0** | **0.0%** | |

**MT**

# State Summary

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $24,390 | -23.0% | -47.8% | $21,183 | -26.0% | $0 | -100.0% | 5 | -50.0% | 26.3% | $4,878 | 10/31/2025 |
| | **Total** | **$24,390** | **-23.0%** | **-47.8%** | **$21,183** | **-26.0%** | **$0** | **-100.0%** | **5** | **-50.0%** | **26.3%** | **$4,878** | |
| Foremost Choice | Dwelling Fire | $49,198 | 35.5% | 11.8% | $51,494 | 70.0% | $10,725 | 69.8% | 19 | 18.8% | 79.2% | $2,589 | 10/31/2025 |
| | Home | $757,921 | 25.9% | 45.2% | $664,809 | 22.6% | $52,031 | -21.3% | 302 | 22.8% | 84.6% | $2,510 | 10/31/2025 |
| | Marine | $979 | -14.2% | 7.5% | $1,238 | 8.5% | $0 | 0.0% | 3 | -25.0% | 75.0% | $326 | 10/31/2025 |
| | Mobile Home | $90,192 | 25.1% | 55.1% | $80,070 | 21.9% | $6,938 | -543.6% | 33 | 3.1% | 70.2% | $2,733 | 10/31/2025 |
| | Motor Home | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $1,077 | -72.0% | 3.2% | $1,077 | -70.7% | $0 | 0.0% | 3 | -40.0% | 60.0% | $359 | 10/31/2025 |
| | Off-Road Veh | $2,907 | 13.9% | 4.9% | $1,882 | -2.9% | $61 | 9999.9% | 5 | -16.7% | 62.5% | $581 | 10/31/2025 |
| | Rental M.H. | $71,947 | 17.8% | 52.1% | $67,641 | 21.3% | $2,743 | -1008.3% | 30 | 11.1% | 85.7% | $2,398 | 10/31/2025 |
| | Travel Trailer | $13,115 | 15.3% | 11.1% | $11,143 | 6.2% | $351 | -1.1% | 24 | 4.3% | 72.7% | $546 | 10/31/2025 |
| | **Total** | **$987,336** | **24.9%** | **44.3%** | **$879,354** | **23.6%** | **$72,849** | **2.7%** | **419** | **16.7%** | **81.7%** | **$2,356** | |
| **Grand Total** | | **$1,011,726** | **23.0%** | **41.2%** | **$900,537** | **21.7%** | **$72,849** | **0.3%** | **424** | **14.9%** | **79.7%** | **$2,386** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 581 | 9 | $13,150 | 507 | 7 | $10,110 | 0.01 | 36 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **581** | **9** | **$13,150** | **507** | **7** | **10,110** | **0.01** | **36** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 235 | 8 | $27,455 | 212 | 7 | $26,636 | 0.03 | 18 | 2 | $9,672 | 11.1% | 10/31/2025 |
| | Home | 473 | 111 | $235,354 | 380 | 88 | $182,196 | 0.23 | 27 | 2 | $3,865 | 7.4% | 10/31/2025 |
| | Marine | 4 | 0 | $0 | 4 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 116 | 15 | $31,012 | 104 | 12 | $24,386 | 0.12 | 12 | 1 | $1,421 | 8.3% | 10/31/2025 |
| | Motor Home | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 5 | 0 | $0 | 5 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 12 | 2 | $601 | 12 | 2 | $601 | 0.17 | 1 | 1 | $371 | 100.0% | 10/31/2025 |
| | Rental M.H. | 16 | 8 | $11,012 | 12 | 6 | $9,483 | 0.50 | 3 | 1 | $2,268 | 33.3% | 10/31/2025 |
| | Travel Trailer | 36 | 10 | $5,729 | 31 | 9 | $5,153 | 0.29 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **899** | **154** | **$311,163** | **762** | **124** | **248,455** | **0.16** | **62** | **7** | **$17,597** | **11.3%** | |
| **Grand Total** | | **1,480** | **163** | **$324,313** | **1,269** | **131** | **258,565** | **0.10** | **98** | **7** | **$17,597** | **7.1%** | |

**NC**

# State Summary

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $1,386,254 | 21.5% | 37.4% | $1,167,687 | 17.0% | $119,385 | 23.4% | 944 | 13.3% | 86.3% | $1,468 | 10/31/2025 |
| | Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Marine | $25,805 | 2.5% | 16.6% | $22,151 | 8.7% | $2,073 | 304.1% | 48 | -4.0% | 87.3% | $538 | 10/31/2025 |
| | Mobile Home | $1,197,960 | -0.2% | 29.0% | $1,021,065 | -2.7% | $54,739 | -19.8% | 815 | -5.2% | 88.9% | $1,470 | 10/31/2025 |
| | Motor Home | $7,438 | -6.6% | 2817.5% | $9,831 | 68.9% | $0 | 0.0% | 5 | -28.6% | 55.6% | $1,488 | 10/31/2025 |
| | Motorcycle | $4,021 | -19.0% | 2.4% | $4,021 | -7.6% | $0 | -100.0% | 7 | -30.0% | 70.0% | $574 | 10/31/2025 |
| | Off-Road Veh | $8,889 | -32.6% | 58.3% | $9,192 | -23.3% | $582 | -77.4% | 75 | 23.0% | 81.5% | $119 | 10/31/2025 |
| | Rental M.H. | $172,482 | 2.9% | 36.9% | $148,349 | -0.6% | $7,673 | -45.6% | 200 | -2.0% | 87.3% | $862 | 10/31/2025 |
| | Travel Trailer | $14,152 | -17.8% | 31.6% | $10,771 | -32.2% | $1,621 | -28.5% | 30 | 0.0% | 76.9% | $472 | 10/31/2025 |
| | **Total** | **$2,817,001** | **9.3%** | **38.3%** | **$2,393,067** | **6.1%** | **$186,073** | **1.3%** | **2,124** | **3.4%** | **86.9%** | **$1,326** | |
| **Grand Total** | | **$2,817,001** | **9.3%** | **38.3%** | **$2,393,067** | **6.1%** | **$186,073** | **1.3%** | **2,124** | **3.4%** | **86.9%** | **$1,326** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **1** | **0** | **$0** | **1** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 603 | 261 | $412,071 | 526 | 222 | $360,508 | 0.42 | 29 | 16 | $33,041 | 55.2% | 10/31/2025 |
| | Home | 3 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 16 | 5 | $3,169 | 16 | 5 | $3,169 | 0.31 | 3 | 2 | $1,866 | 66.7% | 10/31/2025 |
| | Mobile Home | 224 | 57 | $67,882 | 190 | 49 | $58,498 | 0.26 | 14 | 3 | $3,082 | 21.4% | 10/31/2025 |
| | Motor Home | 7 | 2 | $6,555 | 6 | 2 | $6,555 | 0.33 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 6 | 0 | $0 | 5 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 39 | 31 | $4,192 | 37 | 30 | $4,043 | 0.81 | 2 | 3 | $329 | 150.0% | 10/31/2025 |
| | Rental M.H. | 79 | 25 | $35,530 | 68 | 20 | $28,372 | 0.29 | 2 | 1 | $616 | 50.0% | 10/31/2025 |
| | Travel Trailer | 19 | 9 | $5,111 | 16 | 7 | $4,173 | 0.44 | 4 | 2 | $576 | 50.0% | 10/31/2025 |
| | **Total** | **996** | **390** | **$534,510** | **866** | **335** | **465,318** | **0.39** | **55** | **27** | **$39,510** | **49.1%** | |
| **Grand Total** | | **997** | **390** | **$534,510** | **867** | **335** | **465,318** | **0.39** | **55** | **27** | **$39,510** | **49.1%** | |

**NH**

# State Summary

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $6,031 | -42.4% | 171.3% | $4,242 | -45.0% | $0 | -100.0% | 2 | -33.3% | 50.0% | $3,016 | 10/31/2025 |
| | **Total** | **$6,031** | **-42.4%** | **171.3%** | **$4,242** | **-45.0%** | **$0** | **-100.0%** | **2** | **-33.3%** | **50.0%** | **$3,016** | |
| Foremost Choice | Dwelling Fire | $219,722 | 62.2% | 9.4% | $181,837 | 64.3% | $18,939 | 60.9% | 145 | 35.5% | 89.5% | $1,515 | 10/31/2025 |
| | Home | $19,911 | -13.5% | 6.9% | $19,911 | -0.4% | $5,493 | 136.6% | 12 | -7.7% | 92.3% | $1,659 | 10/31/2025 |
| | Marine | $21 | 9999.9% | 0.0% | $21 | 9999.9% | $21 | 9999.9% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $82,135 | 12.2% | 40.6% | $67,674 | 11.9% | $5,999 | 58.0% | 79 | 6.8% | 91.9% | $1,040 | 10/31/2025 |
| | Motorcycle | $1,469 | -1.4% | 5.4% | $1,398 | -6.2% | $0 | 0.0% | 4 | 33.3% | 66.7% | $367 | 10/31/2025 |
| | Off-Road Veh | $97 | 9999.9% | 14.9% | $97 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $97 | 10/31/2025 |
| | Rental M.H. | $6,371 | 34.4% | 10.6% | $5,709 | 41.1% | $0 | -100.0% | 5 | 25.0% | 100.0% | $1,274 | 10/31/2025 |
| | Travel Trailer | $1,205 | -12.4% | 1.0% | $930 | -13.0% | $0 | 0.0% | 4 | -20.0% | 66.7% | $301 | 10/31/2025 |
| | **Total** | **$330,931** | **38.3%** | **18.0%** | **$277,577** | **40.3%** | **$30,452** | **57.2%** | **250** | **21.4%** | **89.3%** | **$1,324** | |
| **Grand Total** | | **$336,962** | **34.9%** | **22.6%** | **$281,819** | **37.1%** | **$30,452** | **40.0%** | **252** | **20.6%** | **88.7%** | **$1,337** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 16 | 1 | $1,263 | 12 | 1 | $1,263 | 0.08 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **16** | **1** | **$1,263** | **12** | **1** | **1,263** | **0.08** | **2** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 99 | 55 | $102,775 | 85 | 46 | $82,166 | 0.54 | 4 | 4 | $6,636 | 100.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 1 | 1 | $206 | 1 | 1 | $206 | 1.00 | 1 | 1 | $206 | 100.0% | 10/31/2025 |
| | Mobile Home | 23 | 12 | $14,441 | 20 | 11 | $13,579 | 0.55 | 3 | 2 | $2,022 | 66.7% | 10/31/2025 |
| | Motorcycle | 3 | 3 | $2,962 | 3 | 3 | $2,962 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 3 | 1 | $97 | 3 | 1 | $97 | 0.33 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 1 | $662 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 2 | 1 | $220 | 2 | 1 | $220 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **132** | **74** | **$121,363** | **114** | **63** | **99,230** | **0.55** | **9** | **7** | **$8,864** | **77.8%** | |
| **Grand Total** | | **148** | **75** | **$122,626** | **126** | **64** | **100,493** | **0.51** | **11** | **7** | **$8,864** | **63.6%** | |

**NV**

# State Summary

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $39,111 | 82.1% | 0.8% | $27,101 | 44.0% | $2,119 | -30.4% | 9 | -25.0% | 52.9% | $4,346 | 10/31/2025 |
| | **Total** | **$39,111** | **82.1%** | **0.8%** | **$27,101** | **44.0%** | **$2,119** | **-30.4%** | **9** | **-25.0%** | **52.9%** | **$4,346** | |
| Foremost Choice | Dwelling Fire | $71,693 | 26.2% | 5.5% | $48,649 | 19.6% | $3,919 | -27.7% | 64 | 0.0% | 84.2% | $1,120 | 10/31/2025 |
| | Home | $12,920 | 33.0% | 435.8% | $12,920 | 33.0% | $0 | 0.0% | 4 | 0.0% | 100.0% | $3,230 | 10/31/2025 |
| | Marine | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $54,211 | 2.9% | 55.0% | $45,772 | 1.0% | $7,120 | 0.9% | 44 | -2.2% | 95.7% | $1,232 | 10/31/2025 |
| | Motor Home | $1,205 | -9.5% | 5.5% | $1,205 | -9.5% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,205 | 10/31/2025 |
| | Motorcycle | $4,425 | -6513.0% | 10.1% | $4,425 | 9999.9% | $0 | 0.0% | 4 | 9999.9% | 100.0% | $1,106 | 10/31/2025 |
| | Off-Road Veh | $254 | -18.6% | 2.0% | $254 | -18.6% | $254 | -18.6% | 1 | 0.0% | 100.0% | $254 | 10/31/2025 |
| | Rental M.H. | $5,799 | 5.6% | 11.8% | $5,503 | 5.5% | $0 | 0.0% | 9 | -10.0% | 90.0% | $644 | 10/31/2025 |
| | Travel Trailer | $1,278 | -1.9% | 5.1% | $1,278 | -1.9% | $188 | -2.1% | 4 | 0.0% | 100.0% | $320 | 10/31/2025 |
| | **Total** | **$151,785** | **19.0%** | **56.8%** | **$120,006** | **15.5%** | **$11,481** | **-11.5%** | **131** | **1.6%** | **89.7%** | **$1,159** | |
| **Grand Total** | | **$190,896** | **28.1%** | **43.6%** | **$147,107** | **19.9%** | **$13,600** | **-15.1%** | **140** | **-0.7%** | **85.9%** | **$1,364** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 213 | 5 | $13,092 | 179 | 2 | $3,059 | 0.01 | 20 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **214** | **5** | **$13,092** | **180** | **2** | **3,059** | **0.01** | **20** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 74 | 12 | $21,372 | 62 | 12 | $21,372 | 0.19 | 3 | 1 | $869 | 33.3% | 10/31/2025 |
| | Home | 24 | 0 | $0 | 19 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 4 | 1 | $1,442 | 3 | 1 | $1,442 | 0.33 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 7 | 4 | $3,828 | 7 | 4 | $3,828 | 0.57 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 3 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **114** | **17** | **$26,642** | **94** | **17** | **26,642** | **0.18** | **4** | **1** | **$869** | **25.0%** | |
| **Grand Total** | | **328** | **22** | **$39,734** | **274** | **19** | **29,701** | **0.07** | **24** | **1** | **$869** | **4.2%** | |

**NY**

# State Summary

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $119,479 | 30.3% | 100.6% | $92,827 | 0.8% | $5,338 | 61.3% | 16 | -11.1% | 44.4% | $7,467 | 10/31/2025 |
| | **Total** | **$119,479** | **30.3%** | **100.6%** | **$92,827** | **0.8%** | **$5,338** | **61.3%** | **16** | **-11.1%** | **44.4%** | **$7,467** | |
| Foremost Choice | Dwelling Fire | $214,905 | 16.5% | 39.6% | $177,450 | 6.7% | $25,644 | 72.6% | 135 | 2.3% | 88.8% | $1,592 | 10/31/2025 |
| | Home | $17,395 | 29.2% | 17.3% | $15,969 | 18.6% | $3,018 | 7.9% | 8 | 14.3% | 100.0% | $2,174 | 10/31/2025 |
| | Marine | $3,678 | 69.3% | 19.4% | $3,678 | 65.0% | $0 | 0.0% | 6 | 0.0% | 75.0% | $613 | 10/31/2025 |
| | Mobile Home | $210,047 | -2.6% | 93.6% | $185,271 | 0.1% | $11,823 | -29.0% | 294 | -3.3% | 88.6% | $714 | 10/31/2025 |
| | Motor Home | $6,445 | -6.6% | 11.7% | $5,164 | -5.6% | $1,630 | -8.8% | 7 | 0.0% | 100.0% | $921 | 10/31/2025 |
| | Motorcycle | $4,877 | -20.4% | 5.5% | $4,927 | -18.0% | $304 | -28.3% | 12 | -14.3% | 70.6% | $406 | 10/31/2025 |
| | Off-Road Veh | $2,921 | 72.2% | 5.3% | $2,538 | 70.8% | $648 | 9999.9% | 11 | 37.5% | 68.8% | $266 | 10/31/2025 |
| | Rental M.H. | $16,643 | 8.5% | 14.8% | $13,981 | 1.4% | $2,450 | 40.6% | 30 | 3.4% | 93.8% | $555 | 10/31/2025 |
| | Travel Trailer | $8,790 | -26.3% | 12.0% | $8,553 | -25.3% | ($64) | -82.9% | 17 | -15.0% | 70.8% | $517 | 10/31/2025 |
| | **Total** | **$485,701** | **6.1%** | **60.6%** | **$417,531** | **3.0%** | **$45,453** | **19.9%** | **520** | **-1.3%** | **87.2%** | **$934** | |
| Farmers | Farmers Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 9/30/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| **Grand Total** | | **$605,180** | **10.1%** | **68.5%** | **$510,358** | **2.6%** | **$50,791** | **23.3%** | **536** | **-1.7%** | **84.8%** | **$1,129** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 935 | 18 | $66,972 | 843 | 13 | $51,177 | 0.02 | 80 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **935** | **18** | **$66,972** | **843** | **13** | **51,177** | **0.02** | **80** | **0** | **$0** | **0.0%** | |
| Farmers | Farmers Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 9/30/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 142 | 20 | $37,689 | 115 | 13 | $23,270 | 0.11 | 15 | 3 | $4,825 | 20.0% | 10/31/2025 |
| | Home | 31 | 1 | $1,973 | 30 | 1 | $1,973 | 0.03 | 3 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 5 | 2 | $1,534 | 5 | 2 | $1,534 | 0.40 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 83 | 28 | $20,931 | 76 | 23 | $17,356 | 0.30 | 8 | 4 | $2,805 | 50.0% | 10/31/2025 |
| | Motor Home | 3 | 0 | $0 | 3 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 19 | 3 | $571 | 19 | 3 | $571 | 0.16 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 17 | 8 | $2,547 | 13 | 6 | $1,728 | 0.46 | 0 | 1 | $265 | 0.0% | 10/31/2025 |
| | Rental M.H. | 12 | 3 | $2,034 | 8 | 1 | $771 | 0.13 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 7 | 4 | $1,601 | 7 | 4 | $1,601 | 0.57 | 0 | 1 | $305 | 0.0% | 10/31/2025 |
| | **Total** | **319** | **69** | **$68,880** | **276** | **53** | **48,804** | **0.19** | **31** | **9** | **$8,200** | **29.0%** | |
| **Grand Total** | | **1,254** | **87** | **$135,852** | **1,119** | **66** | **99,981** | **0.06** | **111** | **9** | **$8,200** | **8.1%** | |

**OH**

# State Summary

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $3,601 | -83.1% | -95.9% | $3,644 | -81.5% | $0 | 0.0% | 2 | -60.0% | 40.0% | $1,801 | 10/31/2025 |
| | **Total** | **$3,601** | **-83.1%** | **-95.9%** | **$3,644** | **-81.5%** | **$0** | **0.0%** | **2** | **-60.0%** | **40.0%** | **$1,801** | |
| Foremost Choice | Dwelling Fire | $1,907,830 | 24.1% | 53.5% | $1,602,222 | 22.2% | $195,248 | 15.5% | 1,497 | 14.6% | 82.2% | $1,274 | 10/31/2025 |
| | Home | $414,093 | 46.5% | 17.4% | $355,541 | 40.2% | $36,498 | 54.1% | 239 | 44.0% | 84.2% | $1,733 | 10/31/2025 |
| | Marine | $4,853 | 54.9% | 7.6% | $4,302 | 59.3% | $343 | 9999.9% | 16 | 14.3% | 88.9% | $303 | 10/31/2025 |
| | Mobile Home | $610,816 | 5.3% | 44.1% | $521,504 | 3.8% | $36,852 | -9.0% | 589 | 0.3% | 86.4% | $1,037 | 10/31/2025 |
| | Motor Home | $3,087 | -43.3% | 14.5% | $3,087 | -43.3% | $0 | 0.0% | 3 | -25.0% | 75.0% | $1,029 | 10/31/2025 |
| | Motorcycle | $20,683 | 9.3% | 6.7% | $21,000 | 9.1% | $1,091 | 2.1% | 42 | 2.4% | 84.0% | $492 | 10/31/2025 |
| | Off-Road Veh | $6,767 | 7.2% | -1.6% | $5,216 | 22.8% | $1,237 | 623.4% | 20 | 11.1% | 83.3% | $338 | 10/31/2025 |
| | Other | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $71,885 | 14.2% | 20.4% | $63,538 | 6.2% | $5,171 | -6.0% | 101 | 4.1% | 87.8% | $712 | 10/31/2025 |
| | Travel Trailer | $25,155 | 20.7% | 17.3% | $23,659 | 16.2% | ($476) | -126.7% | 41 | 10.8% | 91.1% | $614 | 10/31/2025 |
| | **Total** | **$3,065,169** | **21.8%** | **45.5%** | **$2,600,069** | **19.3%** | **$275,964** | **14.1%** | **2,548** | **12.2%** | **83.7%** | **$1,203** | |
| **Grand Total** | | **$3,068,770** | **20.9%** | **45.1%** | **$2,603,713** | **18.4%** | **$275,964** | **14.1%** | **2,550** | **12.1%** | **83.7%** | **$1,203** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 223 | 0 | $0 | 184 | 0 | $0 | 0.00 | 15 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **223** | **0** | **$0** | **184** | **0** | **0** | **0.00** | **15** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 1,846 | 515 | $821,864 | 1,582 | 458 | $731,114 | 0.29 | 159 | 54 | $89,074 | 34.0% | 10/31/2025 |
| | Home | 814 | 118 | $184,521 | 698 | 98 | $155,886 | 0.14 | 71 | 6 | $10,436 | 8.5% | 10/31/2025 |
| | Marine | 44 | 4 | $1,481 | 40 | 3 | $1,134 | 0.08 | 4 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 255 | 95 | $81,626 | 214 | 81 | $66,677 | 0.38 | 7 | 1 | $849 | 14.3% | 10/31/2025 |
| | Motor Home | 8 | 0 | $0 | 6 | 0 | $0 | 0.00 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 38 | 9 | $10,130 | 35 | 9 | $10,130 | 0.26 | 3 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 13 | 6 | $2,368 | 12 | 6 | $2,368 | 0.50 | 1 | 1 | $480 | 100.0% | 10/31/2025 |
| | Other | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 36 | 18 | $15,300 | 31 | 15 | $13,408 | 0.48 | 6 | 3 | $1,654 | 50.0% | 10/31/2025 |
| | Travel Trailer | 23 | 8 | $4,662 | 20 | 8 | $4,662 | 0.40 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **3,077** | **773** | **$1,121,952** | **2,638** | **678** | **985,379** | **0.26** | **254** | **65** | **$102,493** | **25.6%** | |
| **Grand Total** | | **3,300** | **773** | **$1,121,952** | **2,822** | **678** | **985,379** | **0.24** | **269** | **65** | **$102,493** | **24.2%** | |

**OK**

# State Summary

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | -100.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **-100.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $52,215 | 50.6% | 28.4% | $42,796 | 34.3% | $6,801 | -600.1% | 16 | 33.3% | 100.0% | $3,263 | 10/31/2025 |
| | Mobile Home | ($2,065) | -166.3% | -13.0% | $0 | -100.0% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Motor Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Off-Road Veh | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Travel Trailer | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$50,150** | **32.8%** | **27.9%** | **$42,796** | **22.3%** | **$6,801** | **-600.1%** | **16** | **23.1%** | **94.1%** | **$3,134** | |
| **Grand Total** | | **$50,150** | **34.9%** | **27.9%** | **$42,796** | **22.3%** | **$6,801** | **-600.1%** | **16** | **23.1%** | **94.1%** | **$3,134** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 727 | 0 | $0 | 600 | 0 | $0 | 0.00 | 24 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **727** | **0** | **$0** | **600** | **0** | **0** | **0.00** | **24** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 50 | 4 | $14,024 | 40 | 3 | $7,439 | 0.08 | 3 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 8 | 0 | $0 | 7 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **62** | **4** | **$14,024** | **51** | **3** | **7,439** | **0.06** | **4** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **789** | **4** | **$14,024** | **651** | **3** | **7,439** | **0.00** | **28** | **0** | **$0** | **0.0%** | |

**OR**

# State Summary

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $6,367 | -14.6% | 1.1% | $6,646 | 14.2% | $3,326 | 224.2% | 4 | 33.3% | 80.0% | $1,592 | 10/31/2025 |
| | **Total** | **$6,367** | **-14.6%** | **1.1%** | **$6,646** | **14.2%** | **$3,326** | **224.2%** | **4** | **33.3%** | **80.0%** | **$1,592** | |
| Foremost Choice | Dwelling Fire | $33,131 | 16.6% | 54.2% | $28,027 | 20.0% | $2,309 | 74.7% | 19 | 18.8% | 90.5% | $1,744 | 10/31/2025 |
| | Home | $15,962 | 30.8% | 11.6% | $14,244 | 16.7% | $1,296 | -34.1% | 12 | 50.0% | 85.7% | $1,330 | 10/31/2025 |
| | Marine | $787 | 0.4% | 9.5% | $787 | 0.4% | $0 | 0.0% | 2 | 0.0% | 100.0% | $394 | 10/31/2025 |
| | Mobile Home | $22,982 | -12.5% | 10.1% | $17,053 | -22.8% | $3,950 | -18.1% | 24 | -7.7% | 85.7% | $958 | 10/31/2025 |
| | Motor Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Off-Road Veh | $428 | -1.2% | 1.9% | $428 | -1.2% | $0 | 0.0% | 1 | 0.0% | 100.0% | $428 | 10/31/2025 |
| | Rental M.H. | $2,112 | 4.3% | 9.3% | $2,112 | 4.3% | $0 | 0.0% | 2 | 0.0% | 100.0% | $1,056 | 10/31/2025 |
| | Travel Trailer | $379 | 1.1% | 11.2% | $379 | 1.1% | $0 | 0.0% | 1 | 0.0% | 100.0% | $379 | 10/31/2025 |
| | **Total** | **$75,781** | **7.5%** | **29.9%** | **$63,030** | **2.9%** | **$7,555** | **-6.8%** | **61** | **8.9%** | **88.4%** | **$1,242** | |
| **Grand Total** | | **$82,148** | **5.4%** | **28.4%** | **$69,676** | **3.8%** | **$10,881** | **19.1%** | **65** | **10.2%** | **87.8%** | **$1,264** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 35 | 2 | $2,893 | 31 | 2 | $2,893 | 0.06 | 5 | 1 | $2,310 | 20.0% | 10/31/2025 |
| | **Total** | **35** | **2** | **$2,893** | **31** | **2** | **2,893** | **0.06** | **5** | **1** | **$2,310** | **20.0%** | |
| Foremost Choice | Dwelling Fire | 12 | 5 | $7,227 | 7 | 4 | $6,299 | 0.57 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 11 | 6 | $7,185 | 10 | 6 | $7,185 | 0.60 | 1 | 1 | $1,296 | 100.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 6 | 2 | $2,174 | 6 | 2 | $2,174 | 0.33 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 1 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **31** | **13** | **$16,586** | **24** | **12** | **15,658** | **0.50** | **1** | **1** | **$1,296** | **100.0%** | |
| **Grand Total** | | **66** | **15** | **$19,479** | **55** | **14** | **18,551** | **0.25** | **6** | **2** | **$3,606** | **33.3%** | |

**PA**

# State Summary

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $3,617 | -15.4% | -14.5% | $3,269 | -14.8% | $0 | 0.0% | 2 | 0.0% | 66.7% | $1,809 | 10/31/2025 |
| | Personal Auto | $300,861 | -20.9% | 54.4% | $262,257 | -18.3% | $11,077 | -68.8% | 96 | -28.9% | 48.5% | $3,134 | 10/31/2025 |
| | **Total** | **$304,478** | **-20.8%** | **53.5%** | **$265,526** | **-18.3%** | **$11,077** | **-68.8%** | **98** | **-28.5%** | **48.8%** | **$3,107** | |
| Foremost Choice | Dwelling Fire | $1,130,954 | 21.5% | 27.1% | $937,989 | 19.9% | $96,061 | 29.0% | 818 | 14.1% | 79.2% | $1,383 | 10/31/2025 |
| | Home | $104,366 | 48.3% | 236.5% | $87,959 | 49.9% | $19,858 | 66.7% | 58 | 65.7% | 75.3% | $1,799 | 10/31/2025 |
| | Marine | $2,213 | 6.1% | 971.1% | $2,213 | 6.1% | $0 | 0.0% | 5 | 25.0% | 100.0% | $443 | 10/31/2025 |
| | Mobile Home | $390,242 | 4.3% | 42.0% | $335,523 | 3.0% | $23,935 | -16.4% | 472 | -1.5% | 89.2% | $827 | 10/31/2025 |
| | Motor Home | $2,509 | 33.0% | 13.2% | $1,346 | 35.4% | $346 | 9999.9% | 3 | 50.0% | 100.0% | $836 | 10/31/2025 |
| | Motorcycle | $10,525 | -23.1% | 3.6% | $10,393 | -16.4% | $304 | -70.3% | 38 | -11.6% | 88.4% | $277 | 10/31/2025 |
| | Off-Road Veh | $4,328 | 18.0% | 272.4% | $4,178 | 10.5% | ($17) | -142.5% | 31 | 0.0% | 88.6% | $140 | 10/31/2025 |
| | Rental M.H. | $35,717 | 1.4% | 19.3% | $28,796 | -3.5% | $3,551 | -9.2% | 53 | -11.7% | 82.8% | $674 | 10/31/2025 |
| | Travel Trailer | $12,196 | 21.7% | 8.4% | $10,661 | 15.4% | ($594) | 0.0% | 24 | 0.0% | 88.9% | $508 | 10/31/2025 |
| | **Total** | **$1,693,050** | **17.4%** | **43.1%** | **$1,419,058** | **15.8%** | **$143,444** | **19.5%** | **1,502** | **7.7%** | **82.7%** | **$1,127** | |
| **Grand Total** | | **$1,997,528** | **9.4%** | **45.1%** | **$1,684,584** | **8.7%** | **$154,521** | **-0.6%** | **1,600** | **4.4%** | **79.3%** | **$1,248** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 12 | 1 | $526 | 10 | 1 | $526 | 0.10 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 3,252 | 63 | $93,397 | 2,643 | 49 | $71,555 | 0.02 | 180 | 1 | $1,356 | 0.6% | 10/31/2025 |
| | **Total** | **3,264** | **64** | **$93,923** | **2,653** | **50** | **72,081** | **0.02** | **182** | **1** | **$1,356** | **0.5%** | |
| Foremost Choice | Dwelling Fire | 1,144 | 316 | $524,769 | 920 | 258 | $411,235 | 0.28 | 93 | 23 | $39,214 | 24.7% | 10/31/2025 |
| | Home | 157 | 42 | $60,076 | 132 | 35 | $49,415 | 0.27 | 14 | 7 | $10,768 | 50.0% | 10/31/2025 |
| | Marine | 1 | 1 | $190 | 1 | 1 | $190 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 137 | 50 | $40,477 | 117 | 45 | $36,452 | 0.38 | 9 | 2 | $1,457 | 22.2% | 10/31/2025 |
| | Motor Home | 4 | 1 | $346 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 7 | 0 | $0 | 7 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 7 | 4 | $370 | 7 | 4 | $370 | 0.57 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 22 | 4 | $3,771 | 22 | 4 | $3,771 | 0.18 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 14 | 3 | $1,651 | 12 | 3 | $1,651 | 0.25 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **1,493** | **421** | **$631,650** | **1,221** | **350** | **503,084** | **0.29** | **119** | **32** | **$51,439** | **26.9%** | |
| **Grand Total** | | **4,757** | **485** | **$725,573** | **3,874** | **400** | **575,165** | **0.10** | **301** | **33** | **$52,795** | **11.0%** | |

**RI**

# State Summary

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $90,418 | 6.0% | 25.9% | $58,238 | -20.8% | $1,899 | -56.2% | 33 | -17.5% | 70.2% | $2,740 | 10/31/2025 |
| | Home | $16,107 | -6.3% | 173.0% | $16,107 | -6.3% | $2,946 | 5.0% | 5 | -16.7% | 83.3% | $3,221 | 10/31/2025 |
| | Marine | $2,474 | 29.1% | 1620.5% | $2,474 | 29.1% | $460 | 0.0% | 6 | 20.0% | 85.7% | $412 | 10/31/2025 |
| | Mobile Home | $21,361 | 14.5% | 44.2% | $19,318 | 12.4% | $0 | 0.0% | 17 | -5.6% | 94.4% | $1,257 | 10/31/2025 |
| | Motorcycle | $5,274 | 8.1% | 639.7% | $3,430 | -16.4% | $0 | -100.0% | 6 | 0.0% | 66.7% | $879 | 10/31/2025 |
| | Off-Road Veh | $621 | -10.6% | 3.2% | $621 | -10.6% | $0 | 0.0% | 2 | 0.0% | 100.0% | $311 | 10/31/2025 |
| | Rental M.H. | $0 | -100.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Travel Trailer | ($133) | -108.3% | 2770.1% | ($133) | -108.3% | $0 | -100.0% | 2 | -33.3% | 66.7% | ($67) | 10/31/2025 |
| | **Total** | **$136,122** | **4.7%** | **112.0%** | **$100,055** | **-13.9%** | **$5,305** | **-38.2%** | **71** | **-11.3%** | **77.2%** | **$1,917** | |
| **Grand Total** | | **$136,122** | **4.7%** | **112.0%** | **$100,055** | **-13.9%** | **$5,305** | **-38.2%** | **71** | **-11.3%** | **77.2%** | **$1,917** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 46 | 7 | $22,384 | 36 | 5 | $14,419 | 0.14 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 5 | 0 | $0 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 2 | 2 | $1,074 | 2 | 2 | $1,074 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 5 | 0 | $0 | 5 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 8 | 3 | $2,134 | 7 | 2 | $1,046 | 0.29 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **67** | **12** | **$25,592** | **54** | **9** | **16,539** | **0.17** | **1** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **67** | **12** | **$25,592** | **54** | **9** | **16,539** | **0.17** | **1** | **0** | **$0** | **0.0%** | |

**SC**

# State Summary

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $18,529 | -30.1% | 163.4% | $19,448 | -26.6% | $0 | -100.0% | 3 | -25.0% | 27.3% | $6,176 | 10/31/2025 |
| | **Total** | **$18,529** | **-30.1%** | **163.4%** | **$19,448** | **-26.6%** | **$0** | **-100.0%** | **3** | **-25.0%** | **27.3%** | **$6,176** | |
| Foremost Choice | Dwelling Fire | $209,673 | 46.2% | 21.3% | $170,527 | 47.5% | $23,560 | 185.1% | 140 | 27.3% | 85.9% | $1,498 | 10/31/2025 |
| | Home | $119,202 | 90.9% | 24.3% | $104,180 | 76.3% | $18,551 | 84.6% | 72 | 94.6% | 92.3% | $1,656 | 10/31/2025 |
| | Marine | $7,713 | -10.9% | 427.3% | $7,437 | -13.0% | ($761) | -2817.9% | 13 | -13.3% | 81.3% | $593 | 10/31/2025 |
| | Mobile Home | $153,081 | 19.3% | 18.6% | $135,393 | 24.4% | $15,708 | -3.9% | 113 | 15.3% | 90.4% | $1,355 | 10/31/2025 |
| | Motor Home | $6,394 | -9.2% | 16.8% | $4,790 | -11.8% | $3,705 | 7.3% | 3 | -25.0% | 75.0% | $2,131 | 10/31/2025 |
| | Motorcycle | $1,842 | -54.8% | 21.4% | $2,110 | -45.9% | $0 | 0.0% | 6 | -14.3% | 66.7% | $307 | 10/31/2025 |
| | Off-Road Veh | $1,934 | -27.7% | 2.0% | $1,934 | -22.5% | $306 | -14.0% | 9 | -10.0% | 90.0% | $215 | 10/31/2025 |
| | Rental M.H. | $22,285 | -39.6% | 18.2% | $18,733 | -45.8% | $2,333 | -62.0% | 31 | -18.4% | 77.5% | $719 | 10/31/2025 |
| | Travel Trailer | $4,780 | -3.6% | 10.1% | $4,124 | 30.3% | $1,672 | 48.2% | 12 | 20.0% | 92.3% | $398 | 10/31/2025 |
| | **Total** | **$526,904** | **32.2%** | **28.5%** | **$449,228** | **31.5%** | **$65,074** | **42.2%** | **399** | **21.3%** | **87.1%** | **$1,321** | |
| **Grand Total** | | **$545,433** | **28.4%** | **37.1%** | **$468,676** | **27.3%** | **$65,074** | **18.6%** | **402** | **20.7%** | **85.7%** | **$1,357** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 729 | 7 | $29,618 | 599 | 4 | $13,921 | 0.01 | 59 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **729** | **7** | **$29,618** | **599** | **4** | **13,921** | **0.01** | **59** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 313 | 53 | $86,586 | 275 | 49 | $80,906 | 0.18 | 28 | 7 | $9,799 | 25.0% | 10/31/2025 |
| | Home | 369 | 41 | $56,962 | 334 | 38 | $53,020 | 0.11 | 23 | 5 | $7,374 | 21.7% | 10/31/2025 |
| | Marine | 8 | 1 | $918 | 8 | 1 | $918 | 0.13 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 112 | 27 | $43,816 | 105 | 25 | $41,003 | 0.24 | 8 | 3 | $4,348 | 37.5% | 10/31/2025 |
| | Motor Home | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 13 | 2 | $1,163 | 13 | 2 | $1,163 | 0.15 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 17 | 2 | $2,243 | 13 | 2 | $2,243 | 0.15 | 4 | 1 | $800 | 25.0% | 10/31/2025 |
| | Travel Trailer | 13 | 3 | $949 | 12 | 3 | $949 | 0.25 | 1 | 1 | $594 | 100.0% | 10/31/2025 |
| | **Total** | **849** | **129** | **$192,637** | **764** | **120** | **180,202** | **0.16** | **66** | **17** | **$22,915** | **25.8%** | |
| **Grand Total** | | **1,578** | **136** | **$222,255** | **1,363** | **124** | **194,123** | **0.09** | **125** | **17** | **$22,915** | **13.6%** | |

**TN**

# State Summary

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $270,498 | 34.0% | 32.5% | $260,014 | 31.7% | ($3,702) | -197.1% | 46 | 39.4% | 82.1% | $5,880 | 10/31/2025 |
| | Home | $17,687 | -14.6% | 101.7% | $11,760 | -8.1% | $0 | 0.0% | 9 | 0.0% | 100.0% | $1,965 | 10/31/2025 |
| | Marine | $353 | 1.1% | 5.6% | $353 | 1.1% | $0 | 0.0% | 1 | 0.0% | 100.0% | $353 | 10/31/2025 |
| | Mobile Home | $50,771 | 21.1% | 15.7% | $43,630 | 11.4% | $6,472 | 19.7% | 26 | 0.0% | 78.8% | $1,953 | 10/31/2025 |
| | Motorcycle | ($489) | -156.7% | -13.3% | $221 | -74.4% | $0 | 0.0% | 1 | 0.0% | 50.0% | ($489) | 10/31/2025 |
| | Off-Road Veh | $299 | -0.3% | -5.7% | $299 | -0.3% | $0 | 0.0% | 1 | 0.0% | 100.0% | $299 | 10/31/2025 |
| | Rental M.H. | $16,940 | 92.1% | 504.9% | $13,651 | 62.7% | $0 | -100.0% | 9 | 50.0% | 50.0% | $1,882 | 10/31/2025 |
| | Travel Trailer | $3,688 | -6.3% | 16.7% | $2,996 | 12.1% | $0 | -100.0% | 5 | 0.0% | 100.0% | $738 | 10/31/2025 |
| | **Total** | **$359,747** | **29.1%** | **52.3%** | **$332,924** | **27.1%** | **$2,770** | **-74.0%** | **98** | **19.5%** | **78.4%** | **$3,671** | |
| **Grand Total** | | **$359,747** | **29.1%** | **52.3%** | **$332,924** | **27.1%** | **$2,770** | **-74.0%** | **98** | **19.5%** | **78.4%** | **$3,671** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 115 | 0 | $0 | 113 | 0 | $0 | 0.00 | 12 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **115** | **0** | **$0** | **113** | **0** | **0** | **0.00** | **12** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 117 | 23 | $66,182 | 106 | 19 | $53,240 | 0.18 | 17 | 2 | $3,573 | 11.8% | 10/31/2025 |
| | Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 3 | 0 | $0 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 33 | 7 | $13,879 | 25 | 5 | $10,142 | 0.20 | 3 | 1 | $3,405 | 33.3% | 10/31/2025 |
| | Motorcycle | 1 | 1 | $221 | 1 | 1 | $221 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 20 | 12 | $14,310 | 9 | 6 | $11,258 | 0.67 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **178** | **43** | **$94,592** | **148** | **31** | **74,861** | **0.21** | **22** | **3** | **$6,978** | **13.6%** | |
| **Grand Total** | | **293** | **43** | **$94,592** | **261** | **31** | **74,861** | **0.12** | **34** | **3** | **$6,978** | **8.8%** | |

**TX**

# State Summary

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $19,223 | 109.2% | 2.3% | $19,223 | 109.2% | $0 | 0.0% | 3 | 9999.9% | 100.0% | $6,408 | 10/31/2025 |
| | Personal Auto | $170,759 | 17.3% | 29.5% | $148,025 | 13.7% | $24,443 | 432.4% | 33 | -8.3% | 55.9% | $5,175 | 10/31/2025 |
| | **Total** | **$189,982** | **22.8%** | **28.8%** | **$167,248** | **20.0%** | **$24,443** | **432.4%** | **36** | **0.0%** | **58.1%** | **$5,277** | |
| Foremost Choice | Dwelling Fire | $279,986 | 24.1% | 31.2% | $246,229 | 39.5% | $40,084 | 31.8% | 137 | 17.1% | 84.6% | $2,044 | 10/31/2025 |
| | Home | $89,887 | 62.0% | 29.3% | $74,360 | 60.9% | $13,308 | 114.5% | 37 | 48.0% | 82.2% | $2,429 | 10/31/2025 |
| | Marine | $12,763 | 8.5% | 17.7% | $12,205 | 8.9% | $340 | 771.8% | 13 | -13.3% | 76.5% | $982 | 10/31/2025 |
| | Mobile Home | $173,966 | -6.6% | 31.7% | $144,312 | -8.2% | $13,925 | -14.6% | 98 | 3.2% | 86.0% | $1,775 | 10/31/2025 |
| | Motor Home | $4,786 | -18.6% | 18.8% | $4,786 | -18.6% | $0 | -100.0% | 4 | 33.3% | 80.0% | $1,197 | 10/31/2025 |
| | Motorcycle | $5,548 | -17.5% | 4.1% | $4,874 | -40.9% | $0 | -100.0% | 9 | -35.7% | 60.0% | $616 | 10/31/2025 |
| | Off-Road Veh | $1,323 | 166.7% | 4.0% | $1,221 | 106.9% | $95 | -55.4% | 6 | 0.0% | 85.7% | $221 | 10/31/2025 |
| | Other | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $29,701 | -23.5% | 59.9% | $25,840 | -34.5% | $539 | -78.5% | 27 | -15.6% | 84.4% | $1,100 | 10/31/2025 |
| | Travel Trailer | $21,473 | -5.1% | 23.7% | $18,308 | -16.0% | $0 | -100.0% | 21 | -8.7% | 75.0% | $1,023 | 10/31/2025 |
| | **Total** | **$619,433** | **11.9%** | **31.8%** | **$532,135** | **13.9%** | **$68,291** | **21.6%** | **352** | **6.7%** | **82.8%** | **$1,760** | |
| **Grand Total** | | **$809,415** | **14.3%** | **31.1%** | **$699,383** | **15.3%** | **$92,734** | **52.6%** | **388** | **6.0%** | **79.7%** | **$2,086** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 25 | 3 | $13,540 | 22 | 3 | $13,540 | 0.14 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 1,428 | 23 | $55,078 | 1,218 | 21 | $49,830 | 0.02 | 156 | 4 | $14,426 | 2.6% | 10/31/2025 |
| | **Total** | **1,453** | **26** | **$68,618** | **1,240** | **24** | **63,370** | **0.02** | **157** | **4** | **$14,426** | **2.5%** | |
| Foremost Choice | Dwelling Fire | 597 | 45 | $98,956 | 517 | 38 | $81,955 | 0.07 | 31 | 2 | $4,919 | 6.5% | 10/31/2025 |
| | Home | 175 | 20 | $49,699 | 148 | 18 | $43,868 | 0.12 | 6 | 2 | $5,853 | 33.3% | 10/31/2025 |
| | Marine | 4 | 2 | $2,798 | 4 | 2 | $2,798 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 92 | 19 | $33,334 | 71 | 17 | $29,099 | 0.24 | 5 | 2 | $3,748 | 40.0% | 10/31/2025 |
| | Motor Home | 6 | 2 | $2,321 | 6 | 2 | $2,321 | 0.33 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 10 | 1 | $615 | 10 | 1 | $615 | 0.10 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 3 | 1 | $733 | 3 | 1 | $733 | 0.33 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Other | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 17 | 0 | $0 | 17 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 15 | 5 | $4,987 | 14 | 4 | $3,986 | 0.29 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **919** | **95** | **$193,443** | **790** | **83** | **165,375** | **0.11** | **44** | **6** | **$14,520** | **13.6%** | |
| **Grand Total** | | **2,372** | **121** | **$262,061** | **2,030** | **107** | **228,745** | **0.05** | **201** | **10** | **$28,946** | **5.0%** | |

**UT**

# State Summary

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $6,465 | 185.6% | 9.3% | $6,465 | 185.6% | $0 | 0.0% | 4 | 100.0% | 100.0% | $1,616 | 10/31/2025 |
| | Home | $1,971 | 9999.9% | 11.1% | $1,971 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $1,971 | 10/31/2025 |
| | Marine | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $898 | -8.4% | 10.2% | $898 | -8.4% | $0 | 0.0% | 1 | 0.0% | 100.0% | $898 | 10/31/2025 |
| | Motor Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $0 | -100.0% | 0.8% | $0 | -100.0% | $0 | -100.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Off-Road Veh | $220 | 9999.9% | 12.6% | $220 | 9999.9% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $2,048 | 8.9% | 8.9% | $2,048 | 8.9% | $0 | 0.0% | 1 | 0.0% | 100.0% | $2,048 | 10/31/2025 |
| | Travel Trailer | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$11,602** | **109.0%** | **9.4%** | **$11,602** | **109.0%** | **$0** | **-100.0%** | **7** | **75.0%** | **100.0%** | **$1,657** | |
| **Grand Total** | | **$11,602** | **109.0%** | **9.4%** | **$11,602** | **109.0%** | **$0** | **-100.0%** | **7** | **75.0%** | **100.0%** | **$1,657** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 368 | 0 | $0 | 328 | 0 | $0 | 0.00 | 21 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **368** | **0** | **$0** | **328** | **0** | **0** | **0.00** | **21** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 13 | 2 | $4,228 | 12 | 2 | $4,228 | 0.17 | 3 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 4 | 1 | $1,971 | 4 | 1 | $1,971 | 0.25 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **21** | **3** | **$6,199** | **20** | **3** | **6,199** | **0.15** | **3** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **389** | **3** | **$6,199** | **348** | **3** | **6,199** | **0.01** | **24** | **0** | **$0** | **0.0%** | |

**VA**

# State Summary

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $6,071 | 11.3% | 13.6% | $0 | -100.0% | $0 | 0.0% | 2 | 0.0% | 100.0% | $3,036 | 10/31/2025 |
| | Home | $1,180 | 1.9% | 13.8% | $1,180 | 1.9% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,180 | 10/31/2025 |
| | Marine | $292 | 1.4% | 17.0% | $292 | 1.4% | $0 | 0.0% | 1 | 0.0% | 100.0% | $292 | 10/31/2025 |
| | Mobile Home | $45,343 | 4.5% | 61.3% | $34,827 | -9.3% | $400 | -74.6% | 35 | -5.4% | 94.6% | $1,296 | 10/31/2025 |
| | Motorcycle | $167 | 21.9% | 4.7% | $167 | 21.9% | $0 | 0.0% | 1 | 0.0% | 100.0% | $167 | 10/31/2025 |
| | Off-Road Veh | $107 | 0.0% | 0.5% | $0 | 0.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $107 | 10/31/2025 |
| | Rental M.H. | $6,280 | -17.2% | 142.2% | $4,405 | -35.4% | $1,590 | -1.2% | 10 | -23.1% | 71.4% | $628 | 10/31/2025 |
| | Travel Trailer | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$59,440** | **2.3%** | **63.9%** | **$40,871** | **-10.7%** | **$1,990** | **-37.4%** | **51** | **-8.9%** | **89.5%** | **$1,165** | |
| **Grand Total** | | **$59,440** | **2.3%** | **63.9%** | **$40,871** | **-10.7%** | **$1,990** | **-37.4%** | **51** | **-8.9%** | **89.5%** | **$1,165** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 517 | 0 | $0 | 439 | 0 | $0 | 0.00 | 32 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **517** | **0** | **$0** | **439** | **0** | **0** | **0.00** | **32** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 7 | 0 | $0 | 7 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 3 | 0 | $0 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 16 | 0 | $0 | 16 | 0 | $0 | 0.00 | 3 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 1 | $183 | 1 | 1 | $183 | 1.00 | 1 | 1 | $183 | 100.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **27** | **1** | **$183** | **27** | **1** | **183** | **0.04** | **5** | **1** | **$183** | **20.0%** | |
| **Grand Total** | | **544** | **1** | **$183** | **466** | **1** | **183** | **0.00** | **37** | **1** | **$183** | **2.7%** | |

**VT**

# State Summary

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $58,346 | 13.0% | 4.5% | $45,419 | 7.1% | $1,476 | -86.0% | 35 | 12.9% | 81.4% | $1,667 | 10/31/2025 |
| | Home | $13,623 | -8.6% | 3.9% | $12,027 | -10.2% | $0 | -100.0% | 8 | -11.1% | 88.9% | $1,703 | 10/31/2025 |
| | Marine | $594 | 0.0% | 8.9% | $594 | 0.0% | $0 | -100.0% | 2 | 0.0% | 100.0% | $297 | 10/31/2025 |
| | Mobile Home | $66,228 | 0.3% | 9.4% | $54,232 | -8.1% | $3,255 | -27.7% | 75 | -5.1% | 84.3% | $883 | 10/31/2025 |
| | Motor Home | $2,942 | -2.2% | 8.4% | $2,942 | -2.2% | $0 | 0.0% | 3 | 0.0% | 100.0% | $981 | 10/31/2025 |
| | Motorcycle | $2,661 | 4.4% | 3.7% | $1,707 | 5.9% | $0 | 0.0% | 5 | -16.7% | 83.3% | $532 | 10/31/2025 |
| | Off-Road Veh | $4,208 | -10.2% | 1.4% | $1,705 | -1.4% | $221 | -494.6% | 16 | -20.0% | 76.2% | $263 | 10/31/2025 |
| | Rental M.H. | $2,821 | 192.9% | 9.4% | $2,821 | 1915.0% | $0 | -100.0% | 3 | 0.0% | 100.0% | $940 | 10/31/2025 |
| | Travel Trailer | $1,916 | 1.1% | 14.2% | $1,916 | 1.1% | $0 | 0.0% | 6 | 0.0% | 85.7% | $319 | 10/31/2025 |
| | **Total** | **$153,339** | **4.8%** | **6.9%** | **$123,363** | **-0.3%** | **$4,952** | **-58.7%** | **153** | **-3.8%** | **83.6%** | **$1,002** | |
| **Grand Total** | | **$153,339** | **4.8%** | **6.9%** | **$123,363** | **-0.3%** | **$4,952** | **-58.7%** | **153** | **-3.8%** | **83.6%** | **$1,002** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 48 | 12 | $23,055 | 37 | 11 | $19,480 | 0.30 | 4 | 1 | $1,138 | 25.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 26 | 10 | $8,505 | 23 | 8 | $6,657 | 0.35 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 1 | 1 | $112 | 1 | 1 | $112 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 3 | 0 | $0 | 3 | 0 | $0 | 0.00 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 2 | 1 | $660 | 2 | 1 | $660 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **80** | **24** | **$32,332** | **66** | **21** | **26,909** | **0.32** | **7** | **1** | **$1,138** | **14.3%** | |
| **Grand Total** | | **80** | **24** | **$32,332** | **66** | **21** | **26,909** | **0.32** | **7** | **1** | **$1,138** | **14.3%** | |

**WA**

# State Summary

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $12,652 | -31.0% | -10.9% | $10,209 | -44.7% | $0 | -100.0% | 1 | -66.7% | 33.3% | $12,652 | 10/31/2025 |
| | **Total** | **$12,652** | **-31.0%** | **-10.9%** | **$10,209** | **-44.7%** | **$0** | **-100.0%** | **1** | **-66.7%** | **33.3%** | **$12,652** | |
| Foremost Choice | Dwelling Fire | $78,955 | 247.5% | 8.2% | $72,013 | 227.7% | $29,244 | -791.5% | 34 | 161.5% | 73.9% | $2,322 | 10/31/2025 |
| | Home | $36,645 | 150.4% | 10.1% | $34,545 | 183.5% | $6,127 | 183.1% | 16 | 220.0% | 80.0% | $2,290 | 10/31/2025 |
| | Mobile Home | $30,210 | 6.7% | 18.4% | $27,659 | 6.9% | ($9) | -100.7% | 20 | 5.3% | 87.0% | $1,511 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Off-Road Veh | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $5,167 | -23.3% | 10.5% | $5,167 | 4.5% | $2,003 | 2.4% | 3 | 0.0% | 100.0% | $1,722 | 10/31/2025 |
| | Travel Trailer | $2,153 | 9999.9% | 27.5% | $2,153 | 9999.9% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$153,130** | **111.5%** | **12.6%** | **$141,537** | **117.8%** | **$37,365** | **3088.1%** | **73** | **82.5%** | **78.5%** | **$2,098** | |
| **Grand Total** | | **$165,782** | **82.7%** | **9.1%** | **$151,746** | **81.9%** | **$37,365** | **1488.6%** | **74** | **72.1%** | **77.1%** | **$2,240** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 125 | 0 | $0 | 96 | 0 | $0 | 0.00 | 11 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **125** | **0** | **$0** | **96** | **0** | **0** | **0.00** | **11** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 117 | 33 | $86,586 | 103 | 29 | $75,590 | 0.28 | 19 | 9 | $32,328 | 47.4% | 10/31/2025 |
| | Home | 36 | 15 | $29,500 | 31 | 14 | $27,400 | 0.45 | 9 | 3 | $6,127 | 33.3% | 10/31/2025 |
| | Mobile Home | 12 | 4 | $7,545 | 10 | 4 | $7,545 | 0.40 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 4 | 1 | $3,094 | 3 | 1 | $3,094 | 0.33 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **171** | **53** | **$126,725** | **149** | **48** | **113,629** | **0.32** | **30** | **12** | **$38,455** | **40.0%** | |
| **Grand Total** | | **296** | **53** | **$126,725** | **245** | **48** | **113,629** | **0.20** | **41** | **12** | **$38,455** | **29.3%** | |

**WI**

# State Summary

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $121,012 | 27.5% | 135.4% | $92,636 | 27.6% | $3,288 | -55.1% | 54 | 50.0% | 64.3% | $2,241 | 10/31/2025 |
| | **Total** | **$121,012** | **27.5%** | **135.4%** | **$92,636** | **27.6%** | **$3,288** | **-55.1%** | **54** | **50.0%** | **64.3%** | **$2,241** | |
| Foremost Choice | Dwelling Fire | $73,928 | -1.7% | 11.9% | $58,467 | -20.3% | ($2,257) | -145.8% | 53 | -3.6% | 71.6% | $1,395 | 10/31/2025 |
| | Home | $22,933 | 5.6% | 11.2% | $22,806 | 11.1% | $0 | -100.0% | 18 | 12.5% | 78.3% | $1,274 | 10/31/2025 |
| | Marine | $1,059 | 88.1% | 13.8% | $826 | 46.7% | $239 | 9999.9% | 3 | 50.0% | 100.0% | $353 | 10/31/2025 |
| | Mobile Home | $26,280 | 85.2% | 18.1% | $21,666 | 127.9% | $2,804 | -389.1% | 26 | 52.9% | 83.9% | $1,011 | 10/31/2025 |
| | Motor Home | $2,493 | -1.5% | 10.9% | $2,493 | -1.5% | $0 | 0.0% | 2 | 0.0% | 100.0% | $1,247 | 10/31/2025 |
| | Motorcycle | $100,911 | 30.0% | 38.1% | $86,306 | 35.7% | $9,851 | -39.9% | 122 | 45.2% | 81.9% | $827 | 10/31/2025 |
| | Off-Road Veh | $162 | -87.5% | -10.7% | ($24) | -104.3% | $248 | -47.6% | 3 | -25.0% | 75.0% | $54 | 10/31/2025 |
| | Rental M.H. | $571 | 6.7% | 14.1% | $0 | 0.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $571 | 10/31/2025 |
| | Travel Trailer | $3,329 | 35.4% | 18.7% | $3,329 | 35.4% | ($309) | -161.7% | 6 | 20.0% | 75.0% | $555 | 10/31/2025 |
| | **Total** | **$231,666** | **18.1%** | **22.8%** | **$195,869** | **13.2%** | **$10,576** | **-57.8%** | **234** | **25.8%** | **79.3%** | **$990** | |
| **Grand Total** | | **$352,678** | **21.2%** | **61.9%** | **$288,505** | **17.4%** | **$13,864** | **-57.2%** | **288** | **29.7%** | **76.0%** | **$1,225** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 815 | 48 | $63,682 | 710 | 36 | $45,408 | 0.05 | 87 | 1 | $1,259 | 1.1% | 10/31/2025 |
| | **Total** | **815** | **48** | **$63,682** | **710** | **36** | **45,408** | **0.05** | **87** | **1** | **$1,259** | **1.1%** | |
| Foremost Choice | Dwelling Fire | 57 | 19 | $34,899 | 45 | 14 | $25,686 | 0.31 | 3 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 20 | 7 | $11,842 | 17 | 6 | $10,175 | 0.35 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 3 | 1 | $233 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 32 | 14 | $11,322 | 26 | 10 | $7,984 | 0.38 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 377 | 65 | $52,407 | 337 | 60 | $49,718 | 0.18 | 35 | 4 | $4,762 | 11.4% | 10/31/2025 |
| | Off-Road Veh | 11 | 0 | $0 | 8 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 14 | 3 | $1,530 | 13 | 3 | $1,530 | 0.23 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **516** | **109** | **$112,233** | **450** | **93** | **95,093** | **0.21** | **40** | **4** | **$4,762** | **10.0%** | |
| **Grand Total** | | **1,331** | **157** | **$175,915** | **1,160** | **129** | **140,501** | **0.11** | **127** | **5** | **$6,021** | **3.9%** | |

**WV**

# State Summary

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $67,924 | 23.1% | 8.7% | $59,407 | 28.1% | $440 | -90.7% | 55 | 19.6% | 84.6% | $1,235 | 10/31/2025 |
| | Home | $20,973 | 19.8% | 5.3% | $23,317 | 33.2% | $868 | 9999.9% | 16 | 45.5% | 80.0% | $1,311 | 10/31/2025 |
| | Marine | $2,624 | 198.5% | 6.0% | $2,624 | 198.5% | $0 | 0.0% | 5 | 0.0% | 83.3% | $525 | 10/31/2025 |
| | Mobile Home | $123,155 | -3.8% | 107.3% | $101,630 | -4.1% | $2,771 | -72.8% | 121 | -5.5% | 86.4% | $1,018 | 10/31/2025 |
| | Motor Home | $3,037 | 44.4% | 7.2% | $3,037 | 44.4% | ($1,022) | 0.0% | 4 | 33.3% | 80.0% | $759 | 10/31/2025 |
| | Motorcycle | $1,995 | -32.3% | -1.3% | $2,937 | -7.5% | $216 | 9999.9% | 7 | 0.0% | 77.8% | $285 | 10/31/2025 |
| | Off-Road Veh | $7,469 | 74.3% | 4.2% | $7,131 | 55.0% | $793 | 957.3% | 21 | 0.0% | 80.8% | $356 | 10/31/2025 |
| | Rental M.H. | $34,130 | 7.5% | 6.6% | $28,405 | 21.0% | $2,007 | -8.8% | 46 | -4.2% | 85.2% | $742 | 10/31/2025 |
| | Travel Trailer | $8,277 | 2.6% | 7.6% | $8,414 | -4.2% | $268 | -63.4% | 18 | 5.9% | 85.7% | $460 | 10/31/2025 |
| | **Total** | **$269,584** | **7.5%** | **56.7%** | **$236,902** | **11.3%** | **$6,341** | **-64.7%** | **293** | **2.4%** | **84.7%** | **$920** | |
| **Grand Total** | | **$269,584** | **7.5%** | **56.7%** | **$236,902** | **11.3%** | **$6,341** | **-64.7%** | **293** | **2.4%** | **84.7%** | **$920** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 127 | 19 | $23,813 | 101 | 18 | $22,391 | 0.18 | 13 | 2 | $2,798 | 15.4% | 10/31/2025 |
| | Home | 25 | 9 | $12,391 | 24 | 9 | $12,391 | 0.38 | 3 | 1 | $868 | 33.3% | 10/31/2025 |
| | Marine | 3 | 1 | $1,323 | 3 | 1 | $1,323 | 0.33 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 62 | 12 | $9,012 | 52 | 10 | $7,523 | 0.19 | 5 | 2 | $1,302 | 40.0% | 10/31/2025 |
| | Motor Home | 6 | 2 | $1,964 | 6 | 2 | $1,964 | 0.33 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 14 | 2 | $680 | 14 | 2 | $680 | 0.14 | 1 | 1 | $216 | 100.0% | 10/31/2025 |
| | Off-Road Veh | 9 | 5 | $4,316 | 9 | 5 | $4,316 | 0.56 | 1 | 1 | $885 | 100.0% | 10/31/2025 |
| | Rental M.H. | 17 | 6 | $4,071 | 16 | 5 | $3,522 | 0.31 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 4 | 4 | $1,397 | 3 | 4 | $1,397 | 1.33 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **267** | **60** | **$58,967** | **228** | **56** | **55,507** | **0.25** | **26** | **7** | **$6,069** | **26.9%** | |
| **Grand Total** | | **267** | **60** | **$58,967** | **228** | **56** | **55,507** | **0.25** | **26** | **7** | **$6,069** | **26.9%** | |

# Agency Scorecard

**AL**

## 1279198, OLD NATIONAL INSURANCE INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $26,047 | 44.8% | 15.5% | $25,376 | 35.4% | $2,249 | -662.3% | 12 | 20.0% | 92.3% | $2,171 | 10/31/2025 |
| | Home | $6,776 | 22.8% | 20.0% | $4,212 | -3.1% | $2,819 | 96.2% | 4 | -20.0% | 80.0% | $1,694 | 10/31/2025 |
| | Mobile Home | $4,307 | -357.6% | 103.8% | $2,176 | -230.1% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $4,307 | 10/31/2025 |
| | Motor Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $0 | -100.0% | -11.2% | ($264) | 0.0% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $5,015 | 8.0% | 14.6% | $5,015 | 8.0% | $0 | 0.0% | 2 | 0.0% | 100.0% | $2,508 | 10/31/2025 |
| | **Total** | **$42,145** | **57.6%** | **20.3%** | **$36,515** | **40.1%** | **$5,068** | **388.7%** | **19** | **5.6%** | **86.4%** | **$2,218** | |
| **Total** | **Total** | **$42,145** | **57.6%** | **20.3%** | **$36,515** | **40.1%** | **$5,068** | **388.7%** | **19** | **5.6%** | **86.4%** | **$2,218** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 53 | 3 | $6,921 | 48 | 2 | $4,718 | 0.04 | 5 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 20 | 1 | $2,131 | 17 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **73** | **4** | **$9,052** | **65** | **2** | **4,718** | **0.03** | **6** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **73** | **4** | **$9,052** | **65** | **2** | **4,718** | **0.03** | **6** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Maureen Hicks

Role: LBE

LBE UPN:1279198

OLD NATIONAL INSURANCE INC

Address: 806 HIGHWAY 78 W

JASPER AL 35501

Phone/Email: 2052215466 ORHARRIS@GOHARRISINSURANCE.COM

# Agency Scorecard

**AL**

## 1280846, IPROTECT INSURANCE AND FINANCIAL SERVICES INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $11,279 | 9999.9% | 147.7% | $3,776 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 50.0% | $11,279 | 10/31/2025 |
| | **Total** | **$11,279** | **9999.9%** | **147.7%** | **$3,776** | **9999.9%** | **$0** | **0.0%** | **1** | **9999.9%** | **50.0%** | **$11,279** | |
| Foremost Choice | Dwelling Fire | $1,744 | -64.2% | 7026.5% | $1,744 | -45.5% | $1,744 | 2.0% | 1 | -50.0% | 50.0% | $1,744 | 10/31/2025 |
| | Marine | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $7,843 | 40.5% | 26.1% | $6,271 | 53.4% | $1,470 | 9999.9% | 3 | 50.0% | 75.0% | $2,614 | 10/31/2025 |
| | Motor Home | $367 | -77.0% | 17.2% | $367 | -77.0% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $92 | 9999.9% | 10.6% | $92 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $92 | 10/31/2025 |
| | Off-Road Veh | $1,297 | 126.4% | 9.8% | $1,297 | 126.4% | $0 | 0.0% | 3 | 50.0% | 100.0% | $432 | 10/31/2025 |
| | Rental M.H. | $2,974 | 5.4% | 16.9% | $2,974 | 5.4% | $0 | 0.0% | 2 | 0.0% | 100.0% | $1,487 | 10/31/2025 |
| | Travel Trailer | $1,724 | -2.3% | 12.7% | $405 | -14.9% | $0 | 0.0% | 3 | 0.0% | 75.0% | $575 | 10/31/2025 |
| | **Total** | **$16,041** | **-6.8%** | **1310.0%** | **$13,150** | **3.1%** | **$3,214** | **88.0%** | **13** | **8.3%** | **76.5%** | **$1,234** | |
| **Total** | **Total** | **$27,320** | **58.8%** | **852.1%** | **$16,926** | **32.7%** | **$3,214** | **88.0%** | **14** | **16.7%** | **73.7%** | **$1,951** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 94 | 2 | $7,503 | 62 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **94** | **2** | **$7,503** | **62** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 21 | 0 | $0 | 20 | 0 | $0 | 0.00 | 3 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 4 | 0 | $0 | 4 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 7 | 2 | $2,874 | 7 | 2 | $2,874 | 0.29 | 1 | 1 | $1,470 | 100.0% | 10/31/2025 |
| | Motor Home | 4 | 0 | $0 | 4 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 4 | 1 | $92 | 4 | 1 | $92 | 0.25 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 3 | 1 | $741 | 3 | 1 | $741 | 0.33 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 4 | 1 | $690 | 4 | 1 | $690 | 0.25 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **48** | **5** | **$4,397** | **47** | **5** | **4,397** | **0.11** | **6** | **1** | **$1,470** | **16.7%** | |
| **Grand Total** | | **142** | **7** | **$11,900** | **109** | **5** | **4,397** | **0.05** | **6** | **1** | **$1,470** | **16.7%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Lori Diodate

Role: LBE

LBE UPN:1280846

IPROTECT INSURANCE AND FINANCIAL SERVICES INC

Address: 1114 US HIGHWAY 31 S # E

ATHENS AL 35611

Phone/Email: 2564442041 SCOTT@IPROTECTINSURANCE.COM

# Agency Scorecard

**AL**

## 1281379, SCOTT RICHARDS AGENCY LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $35,797 | 5.1% | 55.1% | $27,186 | -4.6% | $0 | 0.0% | 18 | -5.3% | 78.3% | $1,989 | 10/31/2025 |
| | Home | $2,486 | 21.9% | 16.2% | $2,486 | 21.9% | $0 | 0.0% | 1 | 0.0% | 100.0% | $2,486 | 10/31/2025 |
| | Mobile Home | $5,542 | -0.9% | 17.3% | $4,867 | 6.2% | $0 | 0.0% | 3 | 0.0% | 100.0% | $1,847 | 10/31/2025 |
| | Rental M.H. | $6,505 | 64.8% | 17.1% | $5,499 | 10.2% | $0 | 0.0% | 6 | 20.0% | 85.7% | $1,084 | 10/31/2025 |
| | **Total** | **$50,330** | **10.3%** | **45.1%** | **$40,038** | **-0.2%** | **$0** | **0.0%** | **28** | **0.0%** | **82.4%** | **$1,798** | |
| **Total** | **Total** | **$50,330** | **10.3%** | **45.1%** | **$40,038** | **-0.2%** | **$0** | **0.0%** | **28** | **0.0%** | **82.4%** | **$1,798** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 16 | 4 | $6,669 | 15 | 4 | $6,669 | 0.27 | 5 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 2 | $1,006 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **19** | **6** | **$7,675** | **17** | **4** | **6,669** | **0.24** | **5** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **19** | **6** | **$7,675** | **17** | **4** | **6,669** | **0.24** | **5** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner

Portfolio Owner: Maureen Hicks

Role: LBE

LBE UPN:1281379

SCOTT RICHARDS AGENCY LLC

Address: 168 OXMOOR RD

HOMEWOOD AL 35209

Phone/Email: 2059884346 SCOTT@SAVEONINSURANCE.COM

# Agency Scorecard

**AL**

## 1359604, WADE KAISER INSURANCE AGENCY, INC.

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $2,904 | -72.2% | 12.1% | $5,738 | -32.6% | $0 | 0.0% | 3 | -62.5% | 37.5% | $968 | 10/31/2025 |
| | Home | $1,288 | 4.8% | 16.1% | $1,288 | 9999.9% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,288 | 10/31/2025 |
| | Mobile Home | $2,967 | -56.7% | 12.8% | $1,160 | 5.1% | $0 | 0.0% | 2 | -33.3% | 66.7% | $1,484 | 10/31/2025 |
| | **Total** | **$7,159** | **-61.4%** | **12.8%** | **$8,186** | **-14.9%** | **$0** | **0.0%** | **6** | **-50.0%** | **50.0%** | **$1,193** | |
| **Total** | **Total** | **$7,159** | **-61.4%** | **12.8%** | **$8,186** | **-14.9%** | **$0** | **0.0%** | **6** | **-50.0%** | **50.0%** | **$1,193** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 6 | 0 | $0 | 5 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **6** | **0** | **$0** | **5** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 6 | 0 | $0 | 6 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **6** | **0** | **$0** | **6** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **12** | **0** | **$0** | **11** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner

Portfolio Owner: David Rosetta

Role: LBE

LBE UPN:1359604

WADE KAISER INSURANCE AGENCY, INC.

Address: 2473 VALLEYDALE RD STE A

HOOVER AL 35244

Phone/Email: 2052914100 WADE@THEKAISERAGENCY.COM

# Agency Scorecard

**AL**

## 1422759, SOUTHEASTERN FIN SOLUTIONS LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $21,049 | -13.6% | 14.5% | $19,397 | 0.2% | $1,789 | -851.7% | 16 | 6.7% | 88.9% | $1,316 | 10/31/2025 |
| | Mobile Home | $8,917 | -7.0% | 14.8% | $8,917 | -7.0% | ($771) | -73.9% | 7 | -12.5% | 87.5% | $1,274 | 10/31/2025 |
| | Rental M.H. | $12,564 | -15.3% | 16.6% | $9,799 | -12.0% | $957 | 9999.9% | 19 | -9.5% | 86.4% | $661 | 10/31/2025 |
| | Travel Trailer | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$42,530** | **-12.8%** | **15.2%** | **$38,113** | **-4.9%** | **$1,975** | **-162.0%** | **42** | **-4.5%** | **87.5%** | **$1,013** | |
| **Total** | **Total** | **$42,530** | **-12.8%** | **15.2%** | **$38,113** | **-4.9%** | **$1,975** | **-162.0%** | **42** | **-4.5%** | **87.5%** | **$1,013** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | 14 | 3 | $2,578 | 12 | 2 | $2,061 | 0.17 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 5 | 0 | $0 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 5 | 1 | $270 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **24** | **4** | **$2,848** | **16** | **2** | **2,061** | **0.13** | **1** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **24** | **4** | **$2,848** | **16** | **2** | **2,061** | **0.13** | **1** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Maureen Hicks

Role: LBE

LBE UPN:1422759

SOUTHEASTERN FIN SOLUTIONS LLC

Address: 11733 HWY 231

MERIDIANVILLE AL 35759

Phone/Email: 2568286124 JOHNMWOOD2011@GMAIL.COM

AR

# Agency Scorecard

## 141382, BRUCE SARGENT INSURANCE AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $26,961 | 88.3% | 27.3% | $20,775 | 40.5% | $3,150 | 9999.9% | 18 | 28.6% | 100.0% | $1,498 | 10/31/2025 |
| | Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Marine | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $3,619 | 16.4% | 18.9% | $3,619 | 16.4% | $0 | 0.0% | 2 | 0.0% | 100.0% | $1,810 | 10/31/2025 |
| | Rental M.H. | $4,115 | 20.7% | 19.3% | $4,115 | 20.7% | $0 | 0.0% | 4 | 0.0% | 100.0% | $1,029 | 10/31/2025 |
| | Travel Trailer | $0 | -100.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$34,695** | **77.9%** | **25.3%** | **$28,509** | **33.8%** | **$3,150** | **9999.9%** | **24** | **20.0%** | **100.0%** | **$1,446** | |
| **Total** | **Total** | **$34,695** | **77.9%** | **25.3%** | **$28,509** | **33.8%** | **$3,150** | **9999.9%** | **24** | **20.0%** | **100.0%** | **$1,446** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | 30 | 4 | $4,799 | 22 | 2 | $1,570 | 0.09 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 5 | 0 | $0 | 4 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **35** | **4** | **$4,799** | **26** | **2** | **1,570** | **0.08** | **1** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **35** | **4** | **$4,799** | **26** | **2** | **1,570** | **0.08** | **1** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:141382

BRUCE SARGENT INSURANCE AGENCY INC

Address: 1200 BARROW RD STE 111

LITTLE ROCK AR 72205

Phone/Email: 5012235364 BRUCE@SARGENTINSURANCE.NET

**AR**

# Agency Scorecard

## 1277944, ANDERSON INSURANCE INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $190,448 | 7.8% | 54.6% | $174,103 | 12.2% | $10,998 | 0.1% | 99 | 10.0% | 79.2% | $1,924 | 10/31/2025 |
| | Home | $190,257 | 4.7% | 574.6% | $173,464 | 2.3% | $13,536 | -35.0% | 90 | -2.2% | 83.3% | $2,114 | 10/31/2025 |
| | Marine | $473 | 114.0% | 6.6% | $473 | 114.0% | $0 | 0.0% | 2 | 100.0% | 100.0% | $237 | 10/31/2025 |
| | Mobile Home | $1,890 | -79.0% | 17.0% | $3,199 | -56.6% | $0 | 0.0% | 3 | -40.0% | 60.0% | $630 | 10/31/2025 |
| | Motor Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $2,221 | 9999.9% | 192.8% | $2,221 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $2,221 | 10/31/2025 |
| | Off-Road Veh | $3,432 | 32.2% | 4.7% | $2,369 | 58.1% | ($85) | -143.4% | 9 | 28.6% | 90.0% | $381 | 10/31/2025 |
| | Rental M.H. | $1,561 | 3.4% | 19.1% | $1,243 | 2.2% | $0 | 0.0% | 2 | 0.0% | 100.0% | $781 | 10/31/2025 |
| | Travel Trailer | $6,997 | 9.0% | -1.9% | $6,922 | 1.7% | ($445) | -132.1% | 9 | 0.0% | 75.0% | $777 | 10/31/2025 |
| | **Total** | **$397,279** | **5.0%** | **308.6%** | **$363,994** | **6.5%** | **$24,004** | **-28.1%** | **215** | **4.4%** | **81.1%** | **$1,848** | |
| **Total** | **Total** | **$397,279** | **5.0%** | **308.6%** | **$363,994** | **6.5%** | **$24,004** | **-28.1%** | **215** | **4.4%** | **81.1%** | **$1,848** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 83 | 0 | $0 | 61 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **83** | **0** | **$0** | **61** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 89 | 35 | $69,651 | 77 | 30 | $62,682 | 0.39 | 5 | 3 | $6,359 | 60.0% | 10/31/2025 |
| | Home | 57 | 16 | $35,588 | 44 | 12 | $26,661 | 0.27 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 2 | 1 | $252 | 2 | 1 | $252 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 4 | 0 | $0 | 4 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 2 | 1 | $504 | 2 | 1 | $504 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 10 | 3 | $963 | 9 | 3 | $963 | 0.33 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 14 | 3 | $3,223 | 13 | 3 | $3,223 | 0.23 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **179** | **59** | **$110,181** | **152** | **50** | **94,285** | **0.33** | **10** | **3** | **$6,359** | **30.0%** | |
| **Grand Total** | | **262** | **59** | **$110,181** | **213** | **50** | **94,285** | **0.23** | **10** | **3** | **$6,359** | **30.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Virginia Morley

Role: LBE

LBE UPN:1277944

ANDERSON INSURANCE INC

Address: 614 W MAIN ST

RUSSELLVILLE AR 72801

Phone/Email: 4799681116 CLAY@ANDERSONINSURANCEINC.COM

**AR**

# Agency Scorecard

## 1279187, LEGACY INSURANCE GROUP INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $361 | 9999.9% | 0.4% | $361 | 9999.9% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$361** | **9999.9%** | **0.4%** | **$361** | **9999.9%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $2,456 | -87.1% | 27.7% | $2,392 | -87.5% | $0 | -100.0% | 5 | 0.0% | 71.4% | $491 | 10/31/2025 |
| | Home | $18,370 | 11.9% | 28.2% | $18,370 | 11.9% | ($2,428) | -218.0% | 5 | -16.7% | 83.3% | $3,674 | 10/31/2025 |
| | Mobile Home | $6,185 | -28.4% | 19.5% | $6,185 | -28.4% | $899 | 1.1% | 4 | -33.3% | 57.1% | $1,546 | 10/31/2025 |
| | Motor Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Off-Road Veh | $869 | -21.2% | 1479.2% | $869 | -21.2% | $0 | 0.0% | 1 | 0.0% | 100.0% | $869 | 10/31/2025 |
| | Rental M.H. | $4,770 | -24.6% | 18.3% | $3,440 | 56.4% | $2,124 | 76.9% | 4 | 0.0% | 57.1% | $1,193 | 10/31/2025 |
| | Travel Trailer | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$32,650** | **-36.7%** | **61.7%** | **$31,256** | **-34.1%** | **$595** | **-96.7%** | **19** | **-13.6%** | **67.9%** | **$1,718** | |
| **Total** | **Total** | **$33,011** | **-36.0%** | **61.2%** | **$31,617** | **-33.4%** | **$595** | **-96.7%** | **19** | **-13.6%** | **65.5%** | **$1,737** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 2 | 1 | $1,450 | 1 | 1 | $1,450 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **2** | **1** | **$1,450** | **1** | **1** | **1,450** | **1.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 64 | 2 | $4,041 | 49 | 1 | $3,408 | 0.02 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 33 | 0 | $0 | 32 | 0 | $0 | 0.00 | 3 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 5 | 1 | $1,575 | 3 | 1 | $1,575 | 0.33 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 7 | 3 | $2,510 | 7 | 3 | $2,510 | 0.43 | 1 | 1 | $893 | 100.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **111** | **6** | **$8,126** | **93** | **5** | **7,493** | **0.05** | **7** | **1** | **$893** | **14.3%** | |
| **Grand Total** | | **113** | **7** | **$9,576** | **94** | **6** | **8,943** | **0.06** | **7** | **1** | **$893** | **14.3%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Virginia Morley

Role: LBE

LBE UPN:1279187

LEGACY INSURANCE GROUP INC

Address: 1901 E NETTLETON AVE

JONESBORO AR 72401

Phone/Email: 8709357554 CWATKINS@LEGACYINSURANCEAR.COM

# Agency Scorecard

**AR**

## 1280286, BERRYHILL ENTERPRISES INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $15,039 | -2.6% | 25.2% | $7,007 | -16.3% | $3,618 | 7.0% | 8 | 0.0% | 80.0% | $1,880 | 10/31/2025 |
| | Home | $19,130 | -0.4% | 38.7% | $15,870 | -17.4% | ($2,013) | -232.0% | 10 | 0.0% | 83.3% | $1,913 | 10/31/2025 |
| | Mobile Home | $1,212 | -25.0% | 17.9% | $1,212 | -25.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,212 | 10/31/2025 |
| | Motor Home | $8,556 | 2.5% | 15.4% | $8,556 | 2.5% | $0 | -100.0% | 1 | 0.0% | 100.0% | $8,556 | 10/31/2025 |
| | Off-Road Veh | $0 | -100.0% | -16.8% | $0 | -100.0% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Travel Trailer | $1,444 | -53.4% | 19.3% | $698 | -71.3% | $0 | -100.0% | 4 | 0.0% | 80.0% | $361 | 10/31/2025 |
| | **Total** | **$45,381** | **-5.3%** | **28.7%** | **$33,343** | **-17.0%** | **$1,605** | **-87.5%** | **24** | **-4.0%** | **80.0%** | **$1,891** | |
| **Total** | **Total** | **$45,381** | **-5.3%** | **28.7%** | **$33,343** | **-17.0%** | **$1,605** | **-87.5%** | **24** | **-4.0%** | **80.0%** | **$1,891** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 40 | 2 | $4,099 | 33 | 1 | $2,131 | 0.03 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 9 | 2 | $3,138 | 6 | 1 | $1,696 | 0.17 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 3 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 3 | 0 | $0 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 1 | 1 | $746 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **58** | **5** | **$7,983** | **46** | **2** | **3,827** | **0.04** | **2** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **58** | **5** | **$7,983** | **46** | **2** | **3,827** | **0.04** | **2** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Virginia Morley

Role: LBE

LBE UPN:1280286

BERRYHILL ENTERPRISES INC

Address: 16719 CANTRELL RD

LITTLE ROCK AR 72223

Phone/Email: 5018689338 RUSS@BERRYHILLINSURANCE.COM

# Agency Scorecard

**AR**

## 1280289, BERRYHILL ENTERPRISES INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $2,849 | -323.1% | 27.4% | $2,849 | 1200.9% | $0 | 0.0% | 1 | 9999.9% | 50.0% | $2,849 | 10/31/2025 |
| | Home | $7,409 | 166.8% | 30.8% | $6,039 | 117.5% | $2,084 | -25.0% | 3 | 200.0% | 75.0% | $2,470 | 10/31/2025 |
| | Mobile Home | $3,031 | 9999.9% | 24.3% | $3,031 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $3,031 | 10/31/2025 |
| | Rental M.H. | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$13,289** | **785.9%** | **28.8%** | **$11,919** | **297.8%** | **$2,084** | **-25.0%** | **5** | **400.0%** | **71.4%** | **$2,658** | |
| **Total** | **Total** | **$13,289** | **785.9%** | **28.8%** | **$11,919** | **297.8%** | **$2,084** | **-25.0%** | **5** | **400.0%** | **71.4%** | **$2,658** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 110 | 2 | $4,737 | 98 | 2 | $4,737 | 0.02 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 33 | 3 | $5,204 | 28 | 1 | $1,574 | 0.04 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 5 | 1 | $2,872 | 2 | 1 | $2,872 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 2 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **150** | **6** | **$12,813** | **129** | **4** | **9,183** | **0.03** | **1** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **150** | **6** | **$12,813** | **129** | **4** | **9,183** | **0.03** | **1** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner Portfolio Owner: Virginia Morley BERRYHILL ENTERPRISES INC

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100 Role: SUB Address: 16719 CANTRELL RD

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100 LBE UPN:1280286 LITTLE ROCK AR 72223

Annual Average Premium = This Yr R12 NWP / PIF 1280286 Phone/Email: 5018689338 RUSS@BERRYHILLINSURANCE.COM

# Agency Scorecard

**AR**

## 1280292, BERRYHILL ENTERPRISES INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $17,415 | 46.6% | 26.6% | $15,689 | 57.6% | $5,751 | 187.0% | 6 | 20.0% | 75.0% | $2,903 | 10/31/2025 |
| | Home | $14,363 | 15.8% | 30.4% | $14,363 | 15.8% | ($3,698) | -197.8% | 8 | 14.3% | 88.9% | $1,795 | 10/31/2025 |
| | Mobile Home | $4,639 | 12.0% | 55.2% | $2,714 | 2.0% | $0 | 0.0% | 2 | 0.0% | 100.0% | $2,320 | 10/31/2025 |
| | Motor Home | $150 | 0.0% | 5.4% | $150 | 0.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $150 | 10/31/2025 |
| | Motorcycle | $331 | 0.0% | 2.0% | $0 | 0.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $331 | 10/31/2025 |
| | Travel Trailer | $3,736 | -47.4% | 414.4% | $3,178 | -56.9% | $483 | -69.8% | 8 | -27.3% | 72.7% | $467 | 10/31/2025 |
| | **Total** | **$40,634** | **12.8%** | **91.3%** | **$36,094** | **10.9%** | **$2,536** | **-65.7%** | **26** | **-3.7%** | **81.3%** | **$1,563** | |
| **Total** | **Total** | **$40,634** | **12.8%** | **91.3%** | **$36,094** | **10.9%** | **$2,536** | **-65.7%** | **26** | **-3.7%** | **81.3%** | **$1,563** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 96 | 3 | $8,841 | 82 | 2 | $5,187 | 0.02 | 9 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 26 | 2 | $3,711 | 24 | 2 | $3,711 | 0.08 | 3 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 4 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **126** | **5** | **$12,552** | **107** | **4** | **8,898** | **0.04** | **12** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **126** | **5** | **$12,552** | **107** | **4** | **8,898** | **0.04** | **12** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: SUB

LBE UPN:1280286

1280286

BERRYHILL ENTERPRISES INC

Address: 2322 S 58TH ST

FORT SMITH AR 72903

Phone/Email: 4797832801 RUSS@BERRYHILLINSURANCE.COM

# Agency Scorecard

**AR**

## 1280298, BERRYHILL ENTERPRISES INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $18,014 | -9.0% | 66.7% | $15,041 | -27.7% | $5,150 | -19.0% | 11 | 0.0% | 84.6% | $1,638 | 10/31/2025 |
| | Mobile Home | $4,216 | -52.7% | 19.5% | $4,216 | -52.7% | $58 | -98.2% | 4 | -33.3% | 66.7% | $1,054 | 10/31/2025 |
| | Off-Road Veh | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $2,572 | 7.8% | 18.8% | $2,189 | 7.7% | $0 | 0.0% | 5 | 0.0% | 100.0% | $514 | 10/31/2025 |
| | Travel Trailer | $1,414 | -4.3% | 17.8% | $1,414 | -4.3% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,414 | 10/31/2025 |
| | **Total** | **$26,216** | **-19.5%** | **48.5%** | **$22,860** | **-31.2%** | **$5,208** | **-45.8%** | **21** | **-8.7%** | **84.0%** | **$1,248** | |
| **Total** | **Total** | **$26,216** | **-19.5%** | **48.5%** | **$22,860** | **-31.2%** | **$5,208** | **-45.8%** | **21** | **-8.7%** | **84.0%** | **$1,248** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 15 | 2 | $2,896 | 14 | 1 | $837 | 0.07 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 4 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **21** | **2** | **$2,896** | **17** | **1** | **837** | **0.06** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **21** | **2** | **$2,896** | **17** | **1** | **837** | **0.06** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: SUB

LBE UPN:1280286

1280286

BERRYHILL ENTERPRISES INC

Address: 107 N HAZEN AVE

HAZEN AR 72064

Phone/Email: 8702554888 RUSS@BERRYHILLINSURANCE.COM

# Agency Scorecard

**AR**

## 1438082, JONES INSURANCE GROUP LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $136,346 | 22.9% | 28.4% | $115,665 | 12.1% | $4,640 | -62.5% | 66 | 34.7% | 80.5% | $2,066 | 10/31/2025 |
| | Home | $101,052 | -12.5% | 27.7% | $90,898 | -5.1% | $1,213 | -94.0% | 55 | 3.8% | 82.1% | $1,837 | 10/31/2025 |
| | Marine | $1,628 | 17.8% | 2.9% | $1,628 | 17.8% | $0 | 0.0% | 3 | 50.0% | 100.0% | $543 | 10/31/2025 |
| | Mobile Home | $5,193 | 62.4% | 23.7% | $3,131 | -2.1% | $0 | 0.0% | 3 | 50.0% | 100.0% | $1,731 | 10/31/2025 |
| | Motor Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Off-Road Veh | $157 | -87.8% | -0.1% | $645 | -49.8% | $0 | 0.0% | 4 | 0.0% | 80.0% | $39 | 10/31/2025 |
| | Rental M.H. | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Travel Trailer | $955 | -80.9% | 158.0% | $955 | -81.0% | $0 | 0.0% | 2 | -33.3% | 66.7% | $478 | 10/31/2025 |
| | **Total** | **$245,331** | **3.4%** | **29.9%** | **$212,922** | **1.5%** | **$5,853** | **-82.0%** | **133** | **17.7%** | **81.6%** | **$1,845** | |
| **Total** | **Total** | **$245,331** | **3.4%** | **29.9%** | **$212,922** | **1.5%** | **$5,853** | **-82.0%** | **133** | **17.7%** | **81.6%** | **$1,845** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | 144 | 33 | $60,370 | 116 | 25 | $44,407 | 0.22 | 1 | 1 | $1,646 | 100.0% | 10/31/2025 |
| | Home | 56 | 14 | $24,453 | 47 | 10 | $18,433 | 0.21 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 2 | 1 | $575 | 2 | 1 | $575 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 11 | 1 | $1,874 | 10 | 1 | $1,874 | 0.10 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 1 | 1 | $152 | 1 | 1 | $152 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 3 | 0 | $0 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 4 | 0 | $0 | 4 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **221** | **50** | **$87,424** | **183** | **38** | **65,441** | **0.21** | **2** | **1** | **$1,646** | **50.0%** | |
| **Grand Total** | | **221** | **50** | **$87,424** | **183** | **38** | **65,441** | **0.21** | **2** | **1** | **$1,646** | **50.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Virginia Morley

Role: LBE

LBE UPN:1438082

JONES INSURANCE GROUP LLC

Address: 564 LOCUST AVE

CONWAY AR 72034

Phone/Email: 5015130020 BJONES@JONESIG.COM

# Agency Scorecard

**AZ**

## 1299686, INSURANCE PROFESSIONAL AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $1,139 | 9999.9% | 4.0% | $1,139 | 9999.9% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $47,582 | -39.6% | 184.0% | $46,242 | -24.9% | $1,214 | -92.1% | 14 | 0.0% | 50.0% | $3,399 | 10/31/2025 |
| | **Total** | **$48,721** | **-38.2%** | **180.5%** | **$47,381** | **-23.1%** | **$1,214** | **-92.1%** | **14** | **0.0%** | **48.3%** | **$3,480** | |
| Foremost Choice | Dwelling Fire | $40,849 | 88.8% | 176.7% | $33,717 | 55.9% | ($759) | -52.2% | 16 | 77.8% | 84.2% | $2,553 | 10/31/2025 |
| | Home | $14,843 | 25.9% | 12.1% | $14,843 | 51.3% | $4,122 | -42.8% | 12 | 20.0% | 92.3% | $1,237 | 10/31/2025 |
| | Marine | $2,690 | -11.1% | 16.1% | $2,690 | 2.8% | $410 | 0.0% | 2 | 0.0% | 100.0% | $1,345 | 10/31/2025 |
| | Mobile Home | $779 | -6.0% | 19.4% | $779 | -6.0% | $0 | -100.0% | 1 | 0.0% | 100.0% | $779 | 10/31/2025 |
| | Motorcycle | $209 | 9999.9% | 0.0% | $209 | 9999.9% | $209 | 9999.9% | 1 | 9999.9% | 100.0% | $209 | 10/31/2025 |
| | Off-Road Veh | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Travel Trailer | $296 | -3.6% | 8.7% | $0 | -100.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $296 | 10/31/2025 |
| | **Total** | **$59,666** | **58.8%** | **119.9%** | **$52,238** | **48.4%** | **$3,982** | **-41.9%** | **33** | **43.5%** | **89.2%** | **$1,808** | |
| **Total** | **Total** | **$108,387** | **-6.9%** | **154.1%** | **$99,619** | **2.9%** | **$5,196** | **-76.6%** | **47** | **27.0%** | **71.2%** | **$2,306** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 26 | 1 | $12,196 | 26 | 1 | $12,196 | 0.04 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 952 | 14 | $29,828 | 833 | 13 | $27,571 | 0.02 | 57 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **978** | **15** | **$42,024** | **859** | **14** | **39,767** | **0.02** | **57** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 107 | 10 | $19,357 | 79 | 5 | $10,356 | 0.06 | 3 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 26 | 3 | $4,485 | 20 | 3 | $4,485 | 0.15 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 3 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 1 | 1 | $155 | 1 | 1 | $155 | 1.00 | 1 | 1 | $155 | 100.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **137** | **14** | **$23,997** | **102** | **9** | **14,996** | **0.09** | **4** | **1** | **$155** | **25.0%** | |
| **Grand Total** | | **1,115** | **29** | **$66,021** | **961** | **23** | **54,763** | **0.02** | **61** | **1** | **$155** | **1.6%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1299686

INSURANCE PROFESSIONAL AGENCY INC

Address: PO BOX 1815

QUEEN CREEK AZ 85142

Phone/Email: 4804541582 ENDORSEMENTS@INSUREPROAGENT.COM

# Agency Scorecard

**AZ**

## 1380929, GARLAND INS & FINANCIAL SVCS LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $2,843 | 2.0% | 8.6% | $2,843 | 2.0% | $2,843 | 2.0% | 1 | 0.0% | 100.0% | $2,843 | 10/31/2025 |
| | Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $6,710 | 7.6% | 11.5% | $2,652 | -22.2% | $0 | 0.0% | 3 | 0.0% | 100.0% | $2,237 | 10/31/2025 |
| | Off-Road Veh | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Travel Trailer | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$9,553** | **5.9%** | **10.6%** | **$5,495** | **-11.3%** | **$2,843** | **2.0%** | **4** | **0.0%** | **100.0%** | **$2,388** | |
| **Total** | **Total** | **$9,553** | **5.9%** | **10.6%** | **$5,495** | **-11.3%** | **$2,843** | **2.0%** | **4** | **0.0%** | **100.0%** | **$2,388** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 55 | 0 | $0 | 26 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **55** | **0** | **$0** | **26** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **1** | **0** | **$0** | **1** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **56** | **0** | **$0** | **27** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1380929

GARLAND INS & FINANCIAL SVCS LLC

Address: 11811 N TATUM BLVD STE 1004

PHOENIX AZ 85028

Phone/Email: 6029530691 MARK@GARLAND-INSURANCE.COM

# Agency Scorecard

**AZ**

## 1435990, AZPACIFIC INS LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $5,902 | -44.9% | -4.9% | $5,902 | -44.9% | $0 | 0.0% | 1 | -50.0% | 50.0% | $5,902 | 10/31/2025 |
| | Personal Auto | $17,955 | -45.3% | -138.2% | $17,955 | -38.3% | $1,671 | -172.4% | 5 | -16.7% | 71.4% | $3,591 | 10/31/2025 |
| | **Total** | **$23,857** | **-45.2%** | **-104.5%** | **$23,857** | **-40.1%** | **$1,671** | **-172.4%** | **6** | **-25.0%** | **66.7%** | **$3,976** | |
| Foremost Choice | Dwelling Fire | $26,675 | 9.0% | 21.1% | $20,170 | -5.9% | ($1,912) | -192.8% | 15 | -21.1% | 68.2% | $1,778 | 10/31/2025 |
| | Home | $16,948 | 1.5% | 8.4% | $16,948 | 22.1% | $0 | 0.0% | 15 | 0.0% | 100.0% | $1,130 | 10/31/2025 |
| | Mobile Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motor Home | $802 | -55.8% | 5.2% | $802 | -55.8% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $945 | 4.9% | 2.2% | $945 | 4.9% | $0 | 0.0% | 1 | 0.0% | 100.0% | $945 | 10/31/2025 |
| | Off-Road Veh | $590 | -47.4% | 0.1% | $590 | -47.4% | ($478) | -1211.6% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $0 | -100.0% | 14.2% | $0 | -100.0% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Travel Trailer | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$45,960** | **-4.0%** | **15.8%** | **$39,455** | **-5.1%** | **($2,390)** | **-213.6%** | **31** | **-18.4%** | **73.8%** | **$1,483** | |
| **Total** | **Total** | **$69,817** | **-23.6%** | **-23.3%** | **$63,312** | **-22.2%** | **($719)** | **250.7%** | **37** | **-19.6%** | **72.5%** | **$1,887** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 89 | 1 | $1,052 | 75 | 1 | $1,052 | 0.01 | 10 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **89** | **1** | **$1,052** | **75** | **1** | **1,052** | **0.01** | **10** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 19 | 3 | $6,098 | 18 | 3 | $6,098 | 0.17 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 1 | 1 | $2,495 | 1 | 1 | $2,495 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **21** | **4** | **$8,593** | **20** | **4** | **8,593** | **0.20** | **1** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **110** | **5** | **$9,645** | **95** | **5** | **9,645** | **0.05** | **11** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Brian McEntire

Role: LBE

LBE UPN:1435990

AZPACIFIC INS LLC

Address: 7339 E WILLIAMS DR UNIT 25124

SCOTTSDALE AZ 85255

Phone/Email: 4808415545 EDDIE@PROWESTIG.COM

# Agency Scorecard

**CA**

## 143735, PETTITT & TAVERNETTI

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $17,809 | 29.3% | 13.5% | $16,552 | 26.9% | $0 | -100.0% | 10 | -16.7% | 83.3% | $1,781 | 10/31/2025 |
| | Home | $22,870 | 40.5% | 12.4% | $22,870 | 40.5% | $0 | 0.0% | 6 | 0.0% | 100.0% | $3,812 | 10/31/2025 |
| | Mobile Home | $4,483 | 41.8% | 12.7% | $2,245 | 103.5% | $0 | 0.0% | 3 | 0.0% | 100.0% | $1,494 | 10/31/2025 |
| | Rental M.H. | $2,728 | 18.6% | 13.5% | $2,728 | 18.6% | $0 | 0.0% | 2 | 0.0% | 100.0% | $1,364 | 10/31/2025 |
| | **Total** | **$47,890** | **34.8%** | **12.9%** | **$44,395** | **35.6%** | **$0** | **-100.0%** | **21** | **-8.7%** | **91.3%** | **$2,280** | |
| **Total** | **Total** | **$47,890** | **34.8%** | **12.9%** | **$44,395** | **35.6%** | **$0** | **-100.0%** | **21** | **-8.7%** | **91.3%** | **$2,280** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | 6 | 0 | $0 | 6 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **6** | **0** | **$0** | **6** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **6** | **0** | **$0** | **6** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:143735

PETTITT & TAVERNETTI

Address: 333 BROADWAY ST

KING CITY CA 93930

Phone/Email: 8313853227 PLAYOUS@TLCINSKC.COM

# Agency Scorecard

**CA**

## 145682, SAVE ON INSURANCE SERVICES INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $34,256 | -28.9% | 66.1% | $28,055 | -22.0% | $1,472 | -345.3% | 3 | -40.0% | 60.0% | $11,419 | 10/31/2025 |
| | Personal Auto | ($179) | -96.7% | -7.1% | $4,211 | -206.7% | $0 | -100.0% | 1 | -50.0% | 50.0% | ($179) | 10/31/2025 |
| | **Total** | **$34,077** | **-20.3%** | **53.0%** | **$32,266** | **0.7%** | **$1,472** | **-79.0%** | **4** | **-42.9%** | **57.1%** | **$8,519** | |
| Foremost Choice | Dwelling Fire | $102,909 | 49.9% | 100.4% | $88,240 | 37.2% | $18,392 | 83.8% | 27 | -12.9% | 87.1% | $3,811 | 10/31/2025 |
| | Home | $13,643 | 42.4% | 13.9% | $13,643 | 42.4% | $0 | 0.0% | 2 | 0.0% | 100.0% | $6,822 | 10/31/2025 |
| | Motorcycle | $1,179 | 6.5% | -3.1% | $1,179 | 6.5% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,179 | 10/31/2025 |
| | Travel Trailer | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$117,731** | **48.4%** | **87.9%** | **$103,062** | **37.4%** | **$18,392** | **83.8%** | **30** | **-11.8%** | **88.2%** | **$3,924** | |
| **Total** | **Total** | **$151,808** | **24.3%** | **77.2%** | **$135,328** | **26.4%** | **$19,864** | **16.8%** | **34** | **-17.1%** | **82.9%** | **$4,465** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 3 | 0 | $0 | 3 | 0 | $0 | 0.00 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **5** | **0** | **$0** | **5** | **0** | **0** | **0.00** | **2** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 11 | 0 | $0 | 11 | 0 | $0 | 0.00 | 6 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **11** | **0** | **$0** | **11** | **0** | **0** | **0.00** | **6** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **16** | **0** | **$0** | **16** | **0** | **0** | **0.00** | **8** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:145682

SAVE ON INSURANCE SERVICES INC

Address: 10835 SANTA MONICA BLVD #209

LOS ANGELES CA 90025

Phone/Email: 3104747283 KEVIN@SAVE-ONINSURANCE.COM

CA

# Agency Scorecard

## 1279200, WJ SAUNDERS INSURANCE AGENCY

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $10,487 | 37.7% | 388.3% | $7,363 | -3.3% | ($143) | 0.0% | 1 | -50.0% | 50.0% | $10,487 | 10/31/2025 |
| | **Total** | **$10,487** | **37.7%** | **388.3%** | **$7,363** | **-3.3%** | **($143)** | **0.0%** | **1** | **-50.0%** | **50.0%** | **$10,487** | |
| Foremost Choice | Mobile Home | $1,550 | 2.2% | 14.0% | $1,550 | 2.2% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,550 | 10/31/2025 |
| | **Total** | **$1,550** | **2.2%** | **14.0%** | **$1,550** | **2.2%** | **$0** | **0.0%** | **1** | **0.0%** | **100.0%** | **$1,550** | |
| **Total** | **Total** | **$12,037** | **31.8%** | **342.9%** | **$8,913** | **-2.4%** | **($143)** | **0.0%** | **2** | **-33.3%** | **66.7%** | **$6,019** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1279200

WJ SAUNDERS INSURANCE AGENCY

Address: 980 ENCHANTED WAY STE 207

SIMI VALLEY CA 93065

Phone/Email: 8054264855 BILL@WJSAUNDERSINSURANCE.COM

# Agency Scorecard

**CA**

## 1279205, WJ SAUNDERS INSURANCE CORP.

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $4,707 | 64.3% | 242.8% | $2,375 | -17.1% | $0 | 0.0% | 1 | 0.0% | 100.0% | $4,707 | 10/31/2025 |
| | **Total** | **$4,707** | **64.3%** | **242.8%** | **$2,375** | **-17.1%** | **$0** | **0.0%** | **1** | **0.0%** | **100.0%** | **$4,707** | |
| **Total** | **Total** | **$4,707** | **64.3%** | **242.8%** | **$2,375** | **-17.1%** | **$0** | **0.0%** | **1** | **0.0%** | **100.0%** | **$4,707** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: SUB

LBE UPN:1279200

1279200

WJ SAUNDERS INSURANCE CORP.

Address: 980 ENCHANTED WAY STE 207

SIMI VALLEY CA 93065

Phone/Email: 8054264855 BILL@WJSAUNDERSINSURANCE.COM

CA

# Agency Scorecard

## 1279277, JC GLOBAL INSURANCE SERVICES

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $6,411 | -23.6% | 1.2% | $0 | -100.0% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$6,411** | **-23.6%** | **1.2%** | **$0** | **-100.0%** | **$0** | **0.0%** | **0** | **-100.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $9,494 | 317.7% | 16.4% | $7,054 | 920.8% | $0 | 0.0% | 4 | 100.0% | 100.0% | $2,374 | 10/31/2025 |
| | Mobile Home | $1,760 | 7.9% | 13.9% | $1,760 | 7.9% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,760 | 10/31/2025 |
| | **Total** | **$11,254** | **188.3%** | **15.8%** | **$8,814** | **279.6%** | **$0** | **0.0%** | **5** | **66.7%** | **100.0%** | **$2,251** | |
| **Total** | **Total** | **$17,665** | **43.7%** | **8.2%** | **$8,814** | **-12.3%** | **$0** | **0.0%** | **5** | **25.0%** | **83.3%** | **$3,533** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 9 | 0 | $0 | 8 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **10** | **0** | **$0** | **9** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 30 | 2 | $6,348 | 30 | 2 | $6,348 | 0.07 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **32** | **2** | **$6,348** | **32** | **2** | **6,348** | **0.06** | **2** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **42** | **2** | **$6,348** | **41** | **2** | **6,348** | **0.05** | **2** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1279277

JC GLOBAL INSURANCE SERVICES

Address: 6 CENTERPOINTE DR STE 700

LA PALMA CA 90623

Phone/Email: 7145267700 SERVICE@JCGLOBALINS.COM

CA

# Agency Scorecard

## 1279579, PACHECO,PATRICIA ANN

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $3,157 | 55.1% | 14.2% | $3,157 | 55.1% | $0 | 0.0% | 2 | 0.0% | 100.0% | $1,579 | 10/31/2025 |
| | Marine | ($14) | -111.2% | -1.6% | ($14) | -111.2% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $1,043 | 9999.9% | 18.7% | $1,043 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $1,043 | 10/31/2025 |
| | **Total** | **$4,186** | **93.7%** | **14.8%** | **$4,186** | **93.7%** | **$0** | **0.0%** | **3** | **0.0%** | **75.0%** | **$1,395** | |
| **Total** | **Total** | **$4,186** | **93.7%** | **14.8%** | **$4,186** | **93.7%** | **$0** | **0.0%** | **3** | **0.0%** | **75.0%** | **$1,395** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **2** | **0** | **$0** | **2** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 1 | 1 | $1,043 | 1 | 1 | $1,043 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **3** | **1** | **$1,043** | **3** | **1** | **1,043** | **0.33** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **5** | **1** | **$1,043** | **5** | **1** | **1,043** | **0.20** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1279579

PACHECO,PATRICIA ANN

Address: 18327 GRIDLEY RD STE B

CERRITOS CA 90703

Phone/Email: 5624021600 PAT@PACHECOAGENCY.COM

CA

# Agency Scorecard

## 1279738, CEDARWOOD FINANCIAL & INSURANCE SERVICES, INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $88,183 | 119.8% | 15.4% | $81,490 | 128.9% | $14,324 | 101.0% | 34 | 41.7% | 97.1% | $2,594 | 10/31/2025 |
| | Home | $0 | 0.0% | -116.8% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $6,621 | 2.1% | 13.9% | $6,621 | 2.1% | $0 | 0.0% | 4 | 0.0% | 100.0% | $1,655 | 10/31/2025 |
| | Motor Home | $512 | 6.0% | 7.1% | $512 | 6.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $512 | 10/31/2025 |
| | Motorcycle | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Travel Trailer | $555 | 9999.9% | 0.0% | $555 | 9999.9% | $555 | 9999.9% | 1 | 9999.9% | 100.0% | $555 | 10/31/2025 |
| | **Total** | **$95,871** | **104.0%** | **14.8%** | **$89,178** | **110.0%** | **$14,879** | **108.8%** | **40** | **37.9%** | **97.6%** | **$2,397** | |
| **Total** | **Total** | **$95,871** | **104.0%** | **14.8%** | **$89,178** | **110.0%** | **$14,879** | **108.8%** | **40** | **37.9%** | **97.6%** | **$2,397** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 6 | 0 | $0 | 6 | 0 | $0 | 0.00 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **6** | **0** | **$0** | **6** | **0** | **0** | **0.00** | **2** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 76 | 11 | $28,773 | 76 | 11 | $28,773 | 0.14 | 4 | 2 | $4,926 | 50.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 2 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 1 | 1 | $555 | 1 | 1 | $555 | 1.00 | 1 | 1 | $555 | 100.0% | 10/31/2025 |
| | **Total** | **79** | **12** | **$29,328** | **77** | **12** | **29,328** | **0.16** | **5** | **3** | **$5,481** | **60.0%** | |
| **Grand Total** | | **85** | **12** | **$29,328** | **83** | **12** | **29,328** | **0.14** | **7** | **3** | **$5,481** | **42.9%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1279738

CEDARWOOD FINANCIAL & INSURANCE SERVICES, INC

Address: 1777 OAK AVE STE B

DAVIS CA 95616

Phone/Email: 5307530700 YANGA1@CEDARWOODAGENCY.COM

# Agency Scorecard

**CA**

## 1279775, BPH INS & FINANCIAL SRVS INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $924 | 9999.9% | 4.7% | $924 | 9999.9% | $924 | 9999.9% | 1 | 9999.9% | 100.0% | $924 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$924** | **9999.9%** | **4.7%** | **$924** | **9999.9%** | **$924** | **9999.9%** | **1** | **9999.9%** | **100.0%** | **$924** | |
| Foremost Choice | Dwelling Fire | $1,429 | 0.8% | 13.0% | $1,429 | 0.8% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,429 | 10/31/2025 |
| | Mobile Home | $2,351 | 80.2% | 13.8% | $2,351 | 80.2% | $1,022 | 9999.9% | 2 | 100.0% | 100.0% | $1,176 | 10/31/2025 |
| | Motorcycle | $1,643 | 7.9% | 8.0% | $1,534 | 0.7% | $60 | 9999.9% | 2 | 0.0% | 100.0% | $822 | 10/31/2025 |
| | Travel Trailer | $333 | -73.2% | 6.7% | $423 | -65.9% | $0 | 0.0% | 2 | 0.0% | 66.7% | $167 | 10/31/2025 |
| | **Total** | **$5,756** | **4.9%** | **10.7%** | **$5,737** | **4.5%** | **$1,082** | **9999.9%** | **7** | **16.7%** | **87.5%** | **$822** | |
| **Total** | **Total** | **$6,680** | **21.7%** | **10.6%** | **$6,661** | **21.4%** | **$2,006** | **9999.9%** | **8** | **33.3%** | **88.9%** | **$835** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 2 | 1 | $924 | 2 | 1 | $924 | 0.50 | 2 | 1 | $924 | 50.0% | 10/31/2025 |
| | Personal Auto | 10 | 0 | $0 | 10 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **12** | **1** | **$924** | **12** | **1** | **924** | **0.08** | **3** | **1** | **$924** | **33.3%** | |
| Foremost Choice | Dwelling Fire | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 1 | 1 | $1,022 | 1 | 1 | $1,022 | 1.00 | 1 | 1 | $1,022 | 100.0% | 10/31/2025 |
| | Motorcycle | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 1 | 1 | $448 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **5** | **2** | **$1,470** | **4** | **1** | **1,022** | **0.25** | **1** | **1** | **$1,022** | **100.0%** | |
| **Grand Total** | | **17** | **3** | **$2,394** | **16** | **2** | **1,946** | **0.13** | **4** | **2** | **$1,946** | **50.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1279775

BPH INS & FINANCIAL SRVS INC

Address: 1620 35TH AVE STE F

SACRAMENTO CA 95822

Phone/Email: 9164298888 PETERH@BPHIN.COM

# Agency Scorecard

**CA**

## 1279941, FORAKER, LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| **Total** | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: SUB

LBE UPN:1279767

1279767

FORAKER, LLC

Address: 2601 UNION AVE

BAKERSFIELD CA 93305

Phone/Email: 6616339901 INSURE@MTN-PACIFIC.COM

**CA**

# Agency Scorecard

## 1279948, MOUNTAIN PACIFIC INSURANCE SERVICES

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $42,224 | 143.0% | 15.0% | $39,086 | 165.5% | $4,358 | 4.0% | 22 | 69.2% | 100.0% | $1,919 | 10/31/2025 |
| | Home | $5,175 | 17.2% | 13.1% | $5,175 | 17.2% | $0 | 0.0% | 1 | 0.0% | 100.0% | $5,175 | 10/31/2025 |
| | Mobile Home | $3,490 | 24.6% | 12.8% | $3,490 | 24.6% | $0 | 0.0% | 3 | 0.0% | 100.0% | $1,163 | 10/31/2025 |
| | **Total** | **$50,889** | **106.9%** | **14.5%** | **$47,751** | **117.7%** | **$4,358** | **4.0%** | **26** | **52.9%** | **100.0%** | **$1,957** | |
| **Total** | **Total** | **$50,889** | **106.9%** | **14.5%** | **$47,751** | **117.7%** | **$4,358** | **4.0%** | **26** | **52.9%** | **100.0%** | **$1,957** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 5 | 0 | $0 | 5 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **5** | **0** | **$0** | **5** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 53 | 9 | $15,550 | 53 | 9 | $15,550 | 0.17 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 5 | 0 | $0 | 5 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **58** | **9** | **$15,550** | **58** | **9** | **15,550** | **0.16** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **63** | **9** | **$15,550** | **63** | **9** | **15,550** | **0.14** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner Portfolio Owner: Digital Segment MOUNTAIN PACIFIC INSURANCE SERVICES

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100 Role: SUB Address: 2601 UNION AVE

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100 LBE UPN:1279767 BAKERSFIELD CA 93305

Annual Average Premium = This Yr R12 NWP / PIF 1279941 Phone/Email: 6616339901 INSURE@MTN-PACIFIC.COM

# Agency Scorecard

**CA**

## 1281413, RICHARD TURNER INSURANCE AGENCY

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $17,609 | 39.4% | 163.9% | $14,327 | 6.8% | ($1,425) | 0.0% | 7 | -30.0% | 70.0% | $2,516 | 10/31/2025 |
| | Mobile Home | $4,575 | -15.2% | 11.8% | $5,047 | -6.5% | $0 | 0.0% | 4 | 0.0% | 80.0% | $1,144 | 10/31/2025 |
| | Rental M.H. | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$22,184** | **23.1%** | **126.1%** | **$19,374** | **3.0%** | **($1,425)** | **0.0%** | **11** | **-21.4%** | **73.3%** | **$2,017** | |
| **Total** | **Total** | **$22,184** | **23.1%** | **126.1%** | **$19,374** | **3.0%** | **($1,425)** | **0.0%** | **11** | **-21.4%** | **73.3%** | **$2,017** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 1 | 1 | $1,106 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **3** | **1** | **$1,106** | **3** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **3** | **1** | **$1,106** | **3** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1281413

RICHARD TURNER INSURANCE AGENCY

Address: 3511 CAMINO DEL RIO S STE 403

SAN DIEGO CA 92108

Phone/Email: 6192966222 INFO@RTI.INSURE

# Agency Scorecard

**CA**

## 1281444, TURNER,RICHARD

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| **Total** | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Terminated Accounts

Role: SUB

LBE UPN:1281413

1281413

TURNER,RICHARD

Address: 3511 CAMINO DEL RIO S STE 403

SAN DIEGO CA 92108

Phone/Email: 6192966222 RICHARD@RTI.INSURE

CA

# Agency Scorecard

## 1288196, FRED SIMMONS INS MARKETING INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Mobile Home | $1,241 | 7.3% | 12.2% | $0 | -100.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,241 | 10/31/2025 |
| | **Total** | **$1,241** | **7.3%** | **12.2%** | **$0** | **-100.0%** | **$0** | **0.0%** | **1** | **0.0%** | **100.0%** | **$1,241** | |
| **Total** | **Total** | **$1,241** | **7.3%** | **12.2%** | **$0** | **-100.0%** | **$0** | **0.0%** | **1** | **0.0%** | **100.0%** | **$1,241** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1288196

FRED SIMMONS INS MARKETING INC

Address: 11294 COLOMA RD STE A

GOLD RIVER CA 95670

Phone/Email: 9166380585 FRED@FREDSIMMONSINSURANCE.COM

# Agency Scorecard

**CA**

## 1360282, GLEASON,NATHAN DOUGLAS

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $3,935 | -13.0% | 0.7% | $3,935 | 145.9% | $0 | 0.0% | 2 | 9999.9% | 200.0% | $1,968 | 10/31/2025 |
| | **Total** | **$3,935** | **-13.0%** | **0.7%** | **$3,935** | **145.9%** | **$0** | **0.0%** | **2** | **9999.9%** | **200.0%** | **$1,968** | |
| Foremost Choice | Dwelling Fire | $7,709 | -9.8% | 12.7% | $5,715 | -23.4% | $770 | 1.3% | 5 | -28.6% | 71.4% | $1,542 | 10/31/2025 |
| | Home | $10,516 | 63.2% | 13.2% | $10,516 | 63.2% | $0 | 0.0% | 2 | 100.0% | 100.0% | $5,258 | 10/31/2025 |
| | Mobile Home | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Off-Road Veh | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$18,225** | **24.0%** | **12.7%** | **$16,231** | **19.2%** | **$770** | **1.3%** | **7** | **-12.5%** | **77.8%** | **$2,604** | |
| **Total** | **Total** | **$22,160** | **15.3%** | **11.3%** | **$20,166** | **32.5%** | **$770** | **1.3%** | **9** | **12.5%** | **90.0%** | **$2,462** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 5 | 1 | $2,058 | 5 | 1 | $2,058 | 0.20 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **5** | **1** | **$2,058** | **5** | **1** | **2,058** | **0.20** | **1** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 2 | 1 | $1,591 | 2 | 1 | $1,591 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **8** | **1** | **$1,591** | **8** | **1** | **1,591** | **0.13** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **13** | **2** | **$3,649** | **13** | **2** | **3,649** | **0.15** | **1** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1360282

GLEASON,NATHAN DOUGLAS

Address: 22875 SAVI RANCH PKWY STE J

YORBA LINDA CA 92887

Phone/Email: 8337872700 INFO@GLEASONINSURED.COM

CO

# Agency Scorecard

## 146630, AMERICAN INSURANCE EXCHANGE INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | -100.0% | 5.0% | $0 | -100.0% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $102,838 | 93.2% | 21.5% | $93,042 | 99.5% | $11,178 | 139.4% | 46 | 43.8% | 64.8% | $2,236 | 10/31/2025 |
| | **Total** | **$102,838** | **23.1%** | **20.1%** | **$93,042** | **21.0%** | **$11,178** | **139.4%** | **46** | **39.4%** | **63.9%** | **$2,236** | |
| Foremost Choice | Dwelling Fire | $13,669 | -39.8% | 29.4% | $13,967 | -40.5% | $419 | -92.0% | 7 | -22.2% | 70.0% | $1,953 | 10/31/2025 |
| | Home | $68,589 | 14.4% | 33.4% | $58,294 | -2.1% | $0 | -100.0% | 23 | -14.8% | 85.2% | $2,982 | 10/31/2025 |
| | Mobile Home | $6,509 | 113.5% | 26.6% | $6,509 | 1.1% | $0 | -100.0% | 4 | 33.3% | 133.3% | $1,627 | 10/31/2025 |
| | Motor Home | $989 | 9999.9% | 17.4% | $989 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $989 | 10/31/2025 |
| | Rental M.H. | $4,975 | 4.4% | 26.3% | $3,276 | -31.3% | $0 | 0.0% | 3 | 0.0% | 100.0% | $1,658 | 10/31/2025 |
| | Travel Trailer | $283 | -1279.2% | -56.2% | $283 | -1279.2% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $283 | 10/31/2025 |
| | **Total** | **$95,014** | **5.1%** | **31.7%** | **$83,318** | **-11.6%** | **$419** | **-93.1%** | **39** | **-7.1%** | **86.7%** | **$2,436** | |
| **Total** | **Total** | **$197,852** | **13.7%** | **25.6%** | **$176,360** | **3.0%** | **$11,597** | **8.3%** | **85** | **13.3%** | **72.6%** | **$2,328** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 6 | 0 | $0 | 5 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 215 | 39 | $50,823 | 180 | 36 | $45,229 | 0.20 | 16 | 5 | $6,588 | 31.3% | 10/31/2025 |
| | **Total** | **221** | **39** | **$50,823** | **185** | **36** | **45,229** | **0.19** | **16** | **5** | **$6,588** | **31.3%** | |
| Foremost Choice | Dwelling Fire | 14 | 1 | $2,993 | 13 | 1 | $2,993 | 0.08 | 3 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 3 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 1 | 1 | $989 | 1 | 1 | $989 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 1 | 1 | $283 | 1 | 1 | $283 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **19** | **3** | **$4,265** | **17** | **3** | **4,265** | **0.18** | **3** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **240** | **42** | **$55,088** | **202** | **39** | **49,494** | **0.19** | **19** | **5** | **$6,588** | **26.3%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Justin Maurer

Role: LBE

LBE UPN:146630

AMERICAN INSURANCE EXCHANGE INC

Address: 500 N CIRCLE DR STE 206

COLORADO SPRINGS CO 80909

Phone/Email: 7196363948 MICHELE@AIE1.COM

# Agency Scorecard

**CO**

## 147024, ALINK INSURANCE SERVICES LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $20,976 | 504.7% | 95.8% | $19,647 | 466.4% | $24 | -97.7% | 8 | 300.0% | 88.9% | $2,622 | 10/31/2025 |
| | **Total** | **$20,976** | **504.7%** | **95.8%** | **$19,647** | **466.4%** | **$24** | **-97.7%** | **8** | **300.0%** | **88.9%** | **$2,622** | |
| Foremost Choice | Dwelling Fire | $91,499 | 58.4% | 26.8% | $56,110 | -2.5% | $11,622 | 89.7% | 31 | 6.9% | 66.0% | $2,952 | 10/31/2025 |
| | Home | $24,826 | 2.6% | 32.9% | $20,459 | -15.5% | $0 | 0.0% | 9 | -18.2% | 81.8% | $2,758 | 10/31/2025 |
| | Marine | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $18,469 | -6.9% | 51.8% | $17,114 | -2.8% | $0 | 0.0% | 10 | 0.0% | 100.0% | $1,847 | 10/31/2025 |
| | Motor Home | $1,586 | 4.1% | 6.3% | $0 | 0.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,586 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $4,765 | 1021.2% | 21.7% | $3,378 | 694.8% | $0 | 0.0% | 3 | 200.0% | 100.0% | $1,588 | 10/31/2025 |
| | Travel Trailer | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$141,145** | **35.9%** | **31.7%** | **$97,061** | **-2.8%** | **$11,622** | **89.7%** | **54** | **3.8%** | **75.0%** | **$2,614** | |
| **Total** | **Total** | **$162,121** | **51.0%** | **40.7%** | **$116,708** | **12.9%** | **$11,646** | **62.1%** | **62** | **14.8%** | **76.5%** | **$2,615** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 281 | 7 | $10,226 | 243 | 6 | $8,844 | 0.02 | 20 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **282** | **7** | **$10,226** | **244** | **6** | **8,844** | **0.02** | **20** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 112 | 18 | $56,336 | 98 | 14 | $43,890 | 0.14 | 9 | 2 | $4,896 | 22.2% | 10/31/2025 |
| | Home | 2 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 8 | 0 | $0 | 6 | 0 | $0 | 0.00 | 3 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 4 | 2 | $2,914 | 1 | 1 | $1,527 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **132** | **20** | **$59,250** | **112** | **15** | **45,417** | **0.13** | **12** | **2** | **$4,896** | **16.7%** | |
| **Grand Total** | | **414** | **27** | **$69,476** | **356** | **21** | **54,261** | **0.06** | **32** | **2** | **$4,896** | **6.3%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Justin Maurer

Role: LBE

LBE UPN:147024

ALINK INSURANCE SERVICES LLC

Address: 10851 S CROSSROADS DR UNIT A

PARKER CO 80134

Phone/Email: 3037526479 YOURLINKTOSECURITY@ALINK2INS.COM

# Agency Scorecard

**CO**

## 964351, ALINK INSURANCE SERVICES LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $308 | -83.6% | -0.2% | $308 | -83.6% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$308** | **-83.6%** | **-0.2%** | **$308** | **-83.6%** | **$0** | **0.0%** | **0** | **-100.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $10,526 | -9.5% | 31.1% | $10,526 | -25.9% | $3,962 | 3.0% | 3 | -25.0% | 75.0% | $3,509 | 10/31/2025 |
| | Home | $14,869 | 25.3% | 32.4% | $9,563 | 13.1% | $1,865 | 9999.9% | 4 | 0.0% | 100.0% | $3,717 | 10/31/2025 |
| | Mobile Home | $4,451 | -3.6% | 26.0% | $2,552 | -9.6% | $0 | 0.0% | 3 | 0.0% | 100.0% | $1,484 | 10/31/2025 |
| | Motorcycle | $1,083 | 3.0% | 2.1% | $1,083 | 3.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Off-Road Veh | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $0 | 10/31/2025 |
| | **Total** | **$30,929** | **6.0%** | **29.8%** | **$23,724** | **-10.6%** | **$5,827** | **51.5%** | **11** | **-8.3%** | **91.7%** | **$2,812** | |
| **Total** | **Total** | **$31,237** | **0.6%** | **28.8%** | **$24,032** | **-15.4%** | **$5,827** | **51.5%** | **11** | **-15.4%** | **84.6%** | **$2,840** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 37 | 0 | $0 | 25 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **37** | **0** | **$0** | **25** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **1** | **0** | **$0** | **1** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **38** | **0** | **$0** | **26** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Justin Maurer

Role: SUB

LBE UPN:147024

147024

ALINK INSURANCE SERVICES LLC

Address: 2407 W COLORADO AVE

COLORADO SPRINGS CO 80904

Phone/Email: 7194736262 BSYDDALL@ALIGNGROUPINS.COM

CT

# Agency Scorecard

## 147369, M & M INSURANCE NOW LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $23,334 | 31.1% | 8.2% | $21,788 | 25.4% | $3,787 | -20.5% | 12 | 20.0% | 85.7% | $1,945 | 10/31/2025 |
| | Marine | $225 | 9.8% | 9.8% | $225 | 9.8% | $0 | 0.0% | 1 | 0.0% | 100.0% | $225 | 10/31/2025 |
| | Mobile Home | $3,360 | 9999.9% | 7.4% | $3,360 | 9999.9% | $0 | 0.0% | 2 | 9999.9% | 100.0% | $1,680 | 10/31/2025 |
| | Motorcycle | $1,694 | 42.7% | 9.9% | $1,694 | 42.7% | $0 | 0.0% | 3 | 50.0% | 100.0% | $565 | 10/31/2025 |
| | Off-Road Veh | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Travel Trailer | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$28,613** | **49.1%** | **8.3%** | **$27,067** | **44.2%** | **$3,787** | **-20.5%** | **18** | **38.5%** | **85.7%** | **$1,590** | |
| **Total** | **Total** | **$28,613** | **49.1%** | **8.3%** | **$27,067** | **44.2%** | **$3,787** | **-20.5%** | **18** | **38.5%** | **85.7%** | **$1,590** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **2** | **0** | **$0** | **2** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 13 | 4 | $8,910 | 12 | 4 | $8,910 | 0.33 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 2 | 2 | $3,360 | 2 | 2 | $3,360 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 1 | 1 | $473 | 1 | 1 | $473 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 1 | 1 | $171 | 1 | 1 | $171 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **17** | **8** | **$12,914** | **16** | **8** | **12,914** | **0.50** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **19** | **8** | **$12,914** | **18** | **8** | **12,914** | **0.44** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Brad Bicksler

Role: LBE

LBE UPN:147369

M & M INSURANCE NOW LLC

Address: 2600 BERLIN TPKE

NEWINGTON CT 06111

Phone/Email: 8606662121 TEDMAURO1024@GMAIL.COM

CT

# Agency Scorecard

## 147394, INSURANCE ASSOCIATES OF CENTRAL CONNECTICUT, LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $5,592 | 9999.9% | 2.7% | $5,592 | 9999.9% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$5,592** | **9999.9%** | **2.7%** | **$5,592** | **9999.9%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $22,198 | -25.8% | 5.5% | $11,361 | -43.7% | $0 | -100.0% | 9 | -25.0% | 56.3% | $2,466 | 10/31/2025 |
| | Marine | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $6,123 | 155.4% | 14.8% | $6,123 | 155.4% | $527 | -38.0% | 5 | 66.7% | 83.3% | $1,225 | 10/31/2025 |
| | Motor Home | $861 | 9999.9% | 23.8% | $861 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $861 | 10/31/2025 |
| | Motorcycle | $2,106 | -47.0% | 4.5% | $1,295 | -58.7% | $0 | 0.0% | 4 | -42.9% | 57.1% | $527 | 10/31/2025 |
| | Off-Road Veh | $212 | -783.9% | -7.6% | $212 | -783.9% | $0 | 0.0% | 1 | 0.0% | 100.0% | $212 | 10/31/2025 |
| | Travel Trailer | ($203) | -118.7% | -3.1% | ($203) | -118.7% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$31,297** | **-16.2%** | **6.2%** | **$19,649** | **-26.6%** | **$527** | **-84.6%** | **20** | **-16.7%** | **62.5%** | **$1,565** | |
| **Total** | **Total** | **$36,889** | **-1.2%** | **5.7%** | **$25,241** | **-5.7%** | **$527** | **-84.6%** | **20** | **-16.7%** | **60.6%** | **$1,844** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 35 | 1 | $5,559 | 33 | 1 | $5,559 | 0.03 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **35** | **1** | **$5,559** | **33** | **1** | **5,559** | **0.03** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 45 | 4 | $13,402 | 39 | 2 | $7,394 | 0.05 | 7 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 4 | 0 | $0 | 4 | 0 | $0 | 0.00 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 5 | 3 | $3,242 | 5 | 3 | $3,242 | 0.60 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 1 | 1 | $861 | 1 | 1 | $861 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 4 | 0 | $0 | 4 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **62** | **8** | **$17,505** | **56** | **6** | **11,497** | **0.11** | **12** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **97** | **9** | **$23,064** | **89** | **7** | **17,056** | **0.08** | **12** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Sandy Caron

Role: LBE

LBE UPN:147394

INSURANCE ASSOCIATES OF CENTRAL CONNECTICUT, LLC

Address: 1 WELLS RD

WETHERSFIELD CT 06109

Phone/Email: 8605630067 BETSYB@IAOFCCT.COM

CT

# Agency Scorecard

## 1155349, MCGUIGAN,MICHAEL

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $35,264 | -9.4% | 15.0% | $27,493 | -19.3% | ($49) | -103.0% | 33 | -26.7% | 70.2% | $1,069 | 10/31/2025 |
| | Rental M.H. | $1,212 | -22.7% | 11.8% | $1,212 | -22.7% | $0 | 0.0% | 1 | -50.0% | 50.0% | $1,212 | 10/31/2025 |
| | Travel Trailer | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$36,476** | **-10.0%** | **14.9%** | **$28,705** | **-19.4%** | **($49)** | **-103.0%** | **34** | **-27.7%** | **69.4%** | **$1,073** | |
| **Total** | **Total** | **$36,476** | **-10.0%** | **14.9%** | **$28,705** | **-19.4%** | **($49)** | **-103.0%** | **34** | **-27.7%** | **69.4%** | **$1,073** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 4 | 2 | $2,496 | 3 | 1 | $1,311 | 0.33 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **5** | **2** | **$2,496** | **4** | **1** | **1,311** | **0.25** | **1** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **5** | **2** | **$2,496** | **4** | **1** | **1,311** | **0.25** | **1** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Brad Bicksler

Role: SUB

LBE UPN:147369

147369

MCGUIGAN,MICHAEL

Address: 2600 BERLIN TPKE

NEWINGTON CT 06111

Phone/Email: 8606662121 MIKE@MMGROUPBENEFITS.COM

CT

# Agency Scorecard

## 1280261, DANIEL SARDILLI

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $16,017 | 739.9% | 9.2% | $16,017 | 739.9% | $7,413 | 9999.9% | 5 | 400.0% | 62.5% | $3,203 | 10/31/2025 |
| | Mobile Home | $3,341 | 9999.9% | 12.3% | $3,341 | 9999.9% | $0 | 0.0% | 3 | 9999.9% | 150.0% | $1,114 | 10/31/2025 |
| | Motorcycle | $1,039 | -13.2% | 3.2% | $859 | -28.2% | $0 | 0.0% | 1 | -50.0% | 50.0% | $1,039 | 10/31/2025 |
| | Off-Road Veh | ($85) | -110.8% | -66.0% | ($285) | -140.8% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$20,312** | **422.4%** | **7.7%** | **$19,932** | **424.1%** | **$7,413** | **9999.9%** | **9** | **80.0%** | **64.3%** | **$2,257** | |
| **Total** | **Total** | **$20,312** | **422.4%** | **7.7%** | **$19,932** | **424.1%** | **$7,413** | **9999.9%** | **9** | **80.0%** | **64.3%** | **$2,257** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 16 | 0 | $0 | 16 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **16** | **0** | **$0** | **16** | **0** | **0** | **0.00** | **1** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 38 | 7 | $24,172 | 34 | 7 | $24,172 | 0.21 | 5 | 2 | $7,413 | 40.0% | 10/31/2025 |
| | Mobile Home | 4 | 2 | $1,655 | 4 | 2 | $1,655 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **42** | **9** | **$25,827** | **38** | **9** | **25,827** | **0.24** | **5** | **2** | **$7,413** | **40.0%** | |
| **Grand Total** | | **58** | **9** | **$25,827** | **54** | **9** | **25,827** | **0.17** | **6** | **2** | **$7,413** | **33.3%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Brad Bicksler

Role: LBE

LBE UPN:1280261

DANIEL SARDILLI

Address: 22 CENTER ST

SOUTHINGTON CT 06489

Phone/Email: 8606289686 INFO@SARDILLIAGENCY.COM

CT

# Agency Scorecard

## 1375925, ANGELOVIC INSURANCE GROUP LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $57,996 | 73.0% | 8.1% | $51,176 | 83.3% | $2,383 | -144.6% | 20 | 53.8% | 46.5% | $2,900 | 10/31/2025 |
| | Home | $1,003 | 9.6% | 4.1% | $1,003 | 9.6% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,003 | 10/31/2025 |
| | Marine | $173 | -3.9% | 24.7% | $173 | -3.9% | $0 | 0.0% | 1 | 0.0% | 100.0% | $173 | 10/31/2025 |
| | Mobile Home | $3,692 | -14.1% | 14.6% | $3,692 | -14.1% | $0 | -100.0% | 4 | 0.0% | 57.1% | $923 | 10/31/2025 |
| | Motorcycle | $1,885 | 46.6% | -2.3% | $1,885 | 46.6% | $0 | 0.0% | 4 | 33.3% | 100.0% | $471 | 10/31/2025 |
| | Off-Road Veh | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $1,038 | 7.8% | 7.5% | $0 | 0.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,038 | 10/31/2025 |
| | Travel Trailer | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$65,787** | **59.5%** | **8.2%** | **$57,929** | **67.0%** | **$2,383** | **-138.8%** | **31** | **34.8%** | **54.4%** | **$2,122** | |
| **Total** | **Total** | **$65,787** | **59.5%** | **8.2%** | **$57,929** | **67.0%** | **$2,383** | **-138.8%** | **31** | **34.8%** | **54.4%** | **$2,122** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **2** | **0** | **$0** | **2** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 87 | 30 | $83,983 | 80 | 25 | $71,650 | 0.31 | 5 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 4 | 3 | $3,513 | 4 | 3 | $3,513 | 0.75 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 2 | 1 | $416 | 2 | 1 | $416 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 1 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **94** | **34** | **$87,912** | **86** | **29** | **75,579** | **0.34** | **5** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **96** | **34** | **$87,912** | **88** | **29** | **75,579** | **0.33** | **5** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Andy Marciniec

Role: LBE

LBE UPN:1375925

ANGELOVIC INSURANCE GROUP LLC

Address: 450 MONROE TPKE STE 100

MONROE CT 06468

Phone/Email: 2034598000 CARL@ANGELOVIC.COM

CT

# Agency Scorecard

## 1422409, O CONNELL,PETER J

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $2,404 | -72.0% | 2.7% | $6,725 | -21.6% | $0 | -100.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$2,404** | **-72.0%** | **2.7%** | **$6,725** | **-21.6%** | **$0** | **-100.0%** | **0** | **-100.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $10,035 | 268.0% | 6.4% | $6,968 | 196.4% | $3,860 | 9999.9% | 4 | 100.0% | 100.0% | $2,509 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$10,035** | **268.0%** | **6.1%** | **$6,968** | **196.4%** | **$3,860** | **9999.9%** | **4** | **100.0%** | **100.0%** | **$2,509** | |
| **Total** | **Total** | **$12,439** | **10.0%** | **3.9%** | **$13,693** | **25.3%** | **$3,860** | **-24.5%** | **4** | **0.0%** | **57.1%** | **$3,110** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 4 | 1 | $4,254 | 4 | 1 | $4,254 | 0.25 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **4** | **1** | **$4,254** | **4** | **1** | **4,254** | **0.25** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 4 | 2 | $3,792 | 3 | 1 | $725 | 0.33 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **5** | **2** | **$3,792** | **4** | **1** | **725** | **0.25** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **9** | **3** | **$8,046** | **8** | **2** | **4,979** | **0.25** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Brad Bicksler

Role: LBE

LBE UPN:1422409

O CONNELL,PETER J

Address: 160 CHRISTIAN ST

OXFORD CT 06478

Phone/Email: 2035104617 POCONNELLAGENCY@GMAIL.COM

CT

# Agency Scorecard

## 1425215, ELLISAR INSURANCE ASSOCIATES INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $701 | -73.2% | -168.3% | $701 | -73.2% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$701** | **-73.2%** | **-168.3%** | **$701** | **-73.2%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $37,356 | 53.3% | 10.8% | $22,933 | -5.9% | $4,726 | 303.6% | 6 | -14.3% | 54.5% | $6,226 | 10/31/2025 |
| | Mobile Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motor Home | $1,234 | -3.2% | 18.7% | $1,234 | -3.2% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,234 | 10/31/2025 |
| | Motorcycle | $1,274 | 365.0% | 1395.8% | $1,274 | 365.0% | $0 | 0.0% | 2 | 100.0% | 100.0% | $637 | 10/31/2025 |
| | Travel Trailer | $812 | 126.8% | 3.9% | $350 | -2.2% | $0 | 0.0% | 2 | 100.0% | 100.0% | $406 | 10/31/2025 |
| | **Total** | **$40,676** | **54.8%** | **43.4%** | **$25,791** | **-1.8%** | **$4,726** | **303.6%** | **11** | **10.0%** | **68.8%** | **$3,698** | |
| **Total** | **Total** | **$41,377** | **43.2%** | **39.1%** | **$26,492** | **-8.3%** | **$4,726** | **303.6%** | **11** | **10.0%** | **64.7%** | **$3,762** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 6 | 1 | $2,699 | 6 | 1 | $2,699 | 0.17 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **6** | **1** | **$2,699** | **6** | **1** | **2,699** | **0.17** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 45 | 4 | $17,885 | 34 | 1 | $3,462 | 0.03 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 1 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 1 | 1 | $527 | 1 | 1 | $527 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 1 | 1 | $462 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **49** | **6** | **$18,874** | **36** | **2** | **3,989** | **0.06** | **1** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **55** | **7** | **$21,573** | **42** | **3** | **6,688** | **0.07** | **1** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner

Portfolio Owner: Brad Bicksler

Role: LBE

LBE UPN:1425215

ELLISAR INSURANCE ASSOCIATES INC

Address: 649 AMITY RD UNIT 103

BETHANY CT 06524

Phone/Email: 2038595212 JANICE@ELLISARINS.COM

CT

# Agency Scorecard

## 1448074, INSURANCE PROFESSIONAL AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Motorcycle | ($758) | -205.7% | 38.2% | $0 | -100.0% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **($758)** | **-205.7%** | **38.2%** | **$0** | **-100.0%** | **$0** | **0.0%** | **0** | **-100.0%** | **0.0%** | **$0** | |
| **Total** | **Total** | **($758)** | **-205.7%** | **38.2%** | **$0** | **-100.0%** | **$0** | **0.0%** | **0** | **-100.0%** | **0.0%** | **$0** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Terminated Accounts

Role: SUB

LBE UPN:1299686

1299686

INSURANCE PROFESSIONAL AGENCY INC

Address: 2600 BERLIN TPKE

NEWINGTON CT 06111

Phone/Email: 4804541582 MIKE@MMINSURANCENOW.COM

CT

# Agency Scorecard

## 1448655, TRAHAN INSURANCE AGENCY, LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $5,739 | 362.4% | 26.5% | $5,739 | 362.4% | $2,577 | 9999.9% | 3 | 200.0% | 100.0% | $1,913 | 10/31/2025 |
| | Motor Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Travel Trailer | ($255) | -177.7% | 5.1% | $0 | -100.0% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$5,484** | **249.5%** | **24.2%** | **$5,739** | **265.8%** | **$2,577** | **9999.9%** | **3** | **50.0%** | **75.0%** | **$1,828** | |
| **Total** | **Total** | **$5,484** | **249.5%** | **24.2%** | **$5,739** | **265.8%** | **$2,577** | **9999.9%** | **3** | **50.0%** | **75.0%** | **$1,828** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 4 | 0 | $0 | 3 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 7 | 2 | $2,577 | 6 | 2 | $2,577 | 0.33 | 2 | 2 | $2,577 | 100.0% | 10/31/2025 |
| | Motor Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 3 | 0 | $0 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **16** | **2** | **$2,577** | **14** | **2** | **2,577** | **0.14** | **4** | **2** | **$2,577** | **50.0%** | |
| **Grand Total** | | **16** | **2** | **$2,577** | **14** | **2** | **2,577** | **0.14** | **4** | **2** | **$2,577** | **50.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1448655

TRAHAN INSURANCE AGENCY, LLC

Address: 819 VOLUNTOWN RD

GRISWOLD CT 06351

Phone/Email: 8603761234 KEVIN@TRAHANINS.COM

CT

# Agency Scorecard

## 1454242, B&B INS AGENCY LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $23,619 | -4.8% | 58.2% | $16,019 | -1.1% | $163 | -122.1% | 3 | 50.0% | 42.9% | $7,873 | 10/31/2025 |
| | **Total** | **$23,619** | **-4.8%** | **58.2%** | **$16,019** | **-1.1%** | **$163** | **-122.1%** | **3** | **50.0%** | **42.9%** | **$7,873** | |
| Foremost Choice | Dwelling Fire | $9,044 | -5.6% | 11.6% | $9,044 | 28.0% | $0 | 0.0% | 4 | 0.0% | 57.1% | $2,261 | 10/31/2025 |
| | Mobile Home | $0 | -100.0% | 33.5% | $0 | -100.0% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$9,044** | **-17.8%** | **13.7%** | **$9,044** | **6.5%** | **$0** | **0.0%** | **4** | **-20.0%** | **50.0%** | **$2,261** | |
| **Total** | **Total** | **$32,663** | **-8.8%** | **44.9%** | **$25,063** | **1.5%** | **$163** | **-122.1%** | **7** | **0.0%** | **46.7%** | **$4,666** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 26 | 5 | $19,840 | 17 | 4 | $13,977 | 0.24 | 3 | 1 | $1,601 | 33.3% | 10/31/2025 |
| | **Total** | **26** | **5** | **$19,840** | **17** | **4** | **13,977** | **0.24** | **3** | **1** | **$1,601** | **33.3%** | |
| Foremost Choice | Dwelling Fire | 26 | 3 | $8,554 | 24 | 3 | $8,554 | 0.13 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **26** | **3** | **$8,554** | **24** | **3** | **8,554** | **0.13** | **2** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **52** | **8** | **$28,394** | **41** | **7** | **22,531** | **0.17** | **5** | **1** | **$1,601** | **20.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Brad Bicksler

Role: LBE

LBE UPN:1454242

B&B INS AGENCY LLC

Address: 102 CIRCLE DR

BANTAM CT 06750

Phone/Email: 8604178456 KARA@BBINDEPENDENT.COM

# Agency Scorecard

**CT**

## 1469364, THE COLELLA AGENCY LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **-100.0%** | **0.0%** | **$0** | **-100.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $37,119 | 54.8% | 8.3% | $26,030 | 38.3% | $4,022 | -1988.3% | 9 | 50.0% | 90.0% | $4,124 | 10/31/2025 |
| | Marine | $884 | 220.3% | 24.5% | $884 | 220.3% | $0 | 0.0% | 2 | 100.0% | 100.0% | $442 | 10/31/2025 |
| | Mobile Home | $961 | -27.7% | 8.7% | $961 | 27.5% | $961 | 27.5% | 1 | 0.0% | 100.0% | $961 | 10/31/2025 |
| | Motor Home | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $1,922 | 37.0% | 10.8% | $1,922 | 37.0% | $873 | 30.1% | 3 | 50.0% | 75.0% | $641 | 10/31/2025 |
| | Off-Road Veh | $199 | 0.5% | 4.1% | $199 | 0.5% | $0 | 0.0% | 1 | 0.0% | 100.0% | $199 | 10/31/2025 |
| | Travel Trailer | $121 | -71.9% | -1.1% | ($310) | 0.0% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$41,206** | **48.0%** | **8.4%** | **$29,686** | **37.0%** | **$5,856** | **383.2%** | **16** | **33.3%** | **84.2%** | **$2,575** | |
| **Total** | **Total** | **$41,206** | **45.5%** | **8.4%** | **$29,686** | **33.9%** | **$5,856** | **383.2%** | **16** | **33.3%** | **84.2%** | **$2,575** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 14 | 4 | $14,869 | 9 | 3 | $10,934 | 0.33 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 2 | 1 | $601 | 2 | 1 | $601 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 2 | 2 | $1,243 | 2 | 2 | $1,243 | 1.00 | 1 | 1 | $873 | 100.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **19** | **7** | **$16,713** | **14** | **6** | **12,778** | **0.43** | **1** | **1** | **$873** | **100.0%** | |
| **Grand Total** | | **19** | **7** | **$16,713** | **14** | **6** | **12,778** | **0.43** | **1** | **1** | **$873** | **100.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Andy Marciniec

Role: LBE

LBE UPN:1469364

THE COLELLA AGENCY LLC

Address: 34 YORK ST

GUILFORD CT 06437

Phone/Email: 2038846707 DAVE@MYOPTIONSINSURANCE.COM

**DE**

# Agency Scorecard

## 1168678, BLUE HEN INSURANCE

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $65,847 | 48.3% | 24.5% | $52,034 | 21.8% | ($1,736) | -188.9% | 36 | 38.5% | 76.6% | $1,829 | 10/31/2025 |
| | Home | $145,515 | 136.2% | 60.8% | $128,237 | 122.5% | $22,588 | 261.6% | 117 | 134.0% | 92.9% | $1,244 | 10/31/2025 |
| | Marine | $2,674 | -3.6% | 20.0% | $2,041 | -4.6% | $0 | 0.0% | 5 | 0.0% | 100.0% | $535 | 10/31/2025 |
| | Mobile Home | $39,689 | 111.7% | 24.8% | $37,078 | 97.8% | $2,534 | 9999.9% | 26 | 73.3% | 96.3% | $1,527 | 10/31/2025 |
| | Motor Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $2,390 | -2911.8% | 1.1% | $2,390 | 55.0% | $0 | 0.0% | 3 | 50.0% | 100.0% | $797 | 10/31/2025 |
| | Off-Road Veh | $1,383 | 27.7% | 4.4% | $1,383 | 27.7% | $0 | 0.0% | 11 | 83.3% | 100.0% | $126 | 10/31/2025 |
| | Rental M.H. | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Travel Trailer | $268 | 9999.9% | 6.2% | $268 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $268 | 10/31/2025 |
| | **Total** | **$257,766** | **100.6%** | **41.6%** | **$223,431** | **80.4%** | **$23,386** | **185.2%** | **199** | **91.3%** | **90.5%** | **$1,295** | |
| **Total** | **Total** | **$257,766** | **100.6%** | **41.6%** | **$223,431** | **80.4%** | **$23,386** | **185.2%** | **199** | **91.3%** | **90.5%** | **$1,295** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 184 | 21 | $38,805 | 149 | 17 | $30,880 | 0.11 | 10 | 1 | $880 | 10.0% | 10/31/2025 |
| | Home | 173 | 76 | $75,844 | 141 | 64 | $64,147 | 0.45 | 15 | 8 | $7,943 | 53.3% | 10/31/2025 |
| | Marine | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 40 | 12 | $16,047 | 38 | 10 | $13,436 | 0.26 | 7 | 1 | $1,211 | 14.3% | 10/31/2025 |
| | Motor Home | 2 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 10 | 1 | $898 | 8 | 1 | $898 | 0.13 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 9 | 5 | $414 | 9 | 5 | $414 | 0.56 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 8 | 1 | $268 | 6 | 1 | $268 | 0.17 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **427** | **116** | **$132,276** | **353** | **98** | **110,043** | **0.28** | **33** | **10** | **$10,034** | **30.3%** | |
| **Grand Total** | | **427** | **116** | **$132,276** | **353** | **98** | **110,043** | **0.28** | **33** | **10** | **$10,034** | **30.3%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Ben Flatau

Role: LBE

LBE UPN:1168678

BLUE HEN INSURANCE

Address: 1050 INDUSTRIAL DR STE 240

MIDDLETOWN DE 19709

Phone/Email: 3026962242 INSURANCE@BLUEHEN302.COM

**DE**

# Agency Scorecard

## 1277380, MCAFEE INSURANCE AGENCY LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $11,201 | 9999.9% | 2.2% | $887 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 50.0% | $11,201 | 10/31/2025 |
| | **Total** | **$11,201** | **9999.9%** | **2.2%** | **$887** | **9999.9%** | **$0** | **0.0%** | **1** | **9999.9%** | **50.0%** | **$11,201** | |
| Foremost Choice | Dwelling Fire | $66,433 | 33.3% | 13.7% | $60,558 | 21.5% | $1,533 | -76.1% | 44 | 18.9% | 84.6% | $1,510 | 10/31/2025 |
| | Home | $26,664 | 50.3% | 15.2% | $22,440 | 26.5% | $752 | -65.7% | 21 | 40.0% | 80.8% | $1,270 | 10/31/2025 |
| | Mobile Home | $12,450 | 10.6% | 25.0% | $9,810 | 5.0% | $0 | -100.0% | 15 | 0.0% | 88.2% | $830 | 10/31/2025 |
| | Motor Home | $0 | -100.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $7,610 | 19.0% | 83.5% | $6,347 | -0.7% | ($631) | -319.9% | 3 | 0.0% | 50.0% | $2,537 | 10/31/2025 |
| | Off-Road Veh | $75 | 0.0% | 13.0% | $75 | 0.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $75 | 10/31/2025 |
| | Rental M.H. | $984 | 6.7% | 90.0% | $984 | 6.7% | $0 | 0.0% | 2 | 0.0% | 100.0% | $492 | 10/31/2025 |
| | Travel Trailer | $301 | 9999.9% | 6.2% | $301 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $301 | 10/31/2025 |
| | **Total** | **$114,517** | **33.1%** | **21.2%** | **$100,515** | **19.2%** | **$1,654** | **-84.2%** | **87** | **19.2%** | **82.9%** | **$1,316** | |
| **Total** | **Total** | **$125,718** | **46.1%** | **19.3%** | **$101,402** | **20.3%** | **$1,654** | **-84.2%** | **88** | **20.5%** | **82.2%** | **$1,429** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 60 | 2 | $6,842 | 48 | 0 | $0 | 0.00 | 5 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **60** | **2** | **$6,842** | **48** | **0** | **0** | **0.00** | **5** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 99 | 15 | $30,007 | 82 | 10 | $24,786 | 0.12 | 4 | 1 | $1,407 | 25.0% | 10/31/2025 |
| | Home | 54 | 11 | $8,522 | 40 | 6 | $4,961 | 0.15 | 4 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 10 | 2 | $1,877 | 9 | 2 | $1,877 | 0.22 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 6 | 3 | $2,886 | 5 | 2 | $1,319 | 0.40 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 1 | 1 | $301 | 1 | 1 | $301 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **172** | **32** | **$43,593** | **138** | **21** | **33,244** | **0.15** | **8** | **1** | **$1,407** | **12.5%** | |
| **Grand Total** | | **232** | **34** | **$50,435** | **186** | **21** | **33,244** | **0.11** | **13** | **1** | **$1,407** | **7.7%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Ben Flatau

Role: LBE

LBE UPN:1277380

MCAFEE INSURANCE AGENCY LLC

Address: 1816 W 4TH ST

WILMINGTON DE 19805

Phone/Email: 3026557999 DEBRA@MCAFEEINSURE.COM

# Agency Scorecard

**DE**

## 1277682, WOLFF INSURANCE AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $15,362 | 179.0% | 13.5% | $13,702 | 148.8% | $0 | 0.0% | 8 | 166.7% | 88.9% | $1,920 | 10/31/2025 |
| | Home | $3,202 | 73.6% | 12.3% | $1,164 | 9999.9% | $0 | 0.0% | 2 | 100.0% | 100.0% | $1,601 | 10/31/2025 |
| | Mobile Home | $12,672 | 12.9% | -25.0% | $11,283 | 0.6% | $0 | 0.0% | 10 | 11.1% | 90.9% | $1,267 | 10/31/2025 |
| | Motorcycle | $233 | 39.5% | -87.9% | $233 | -38.4% | $0 | -100.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Off-Road Veh | $101 | 1.0% | 10.2% | $101 | 1.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $101 | 10/31/2025 |
| | **Total** | **$31,570** | **67.6%** | **-6.7%** | **$26,483** | **53.9%** | **$0** | **-100.0%** | **21** | **50.0%** | **87.5%** | **$1,503** | |
| **Total** | **Total** | **$31,570** | **67.6%** | **-6.7%** | **$26,483** | **53.9%** | **$0** | **-100.0%** | **21** | **50.0%** | **87.5%** | **$1,503** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 21 | 6 | $30,023 | 20 | 5 | $28,363 | 0.25 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 4 | 1 | $1,164 | 2 | 1 | $1,164 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 6 | 2 | $1,643 | 5 | 2 | $1,643 | 0.40 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 4 | 1 | $1,144 | 4 | 1 | $1,144 | 0.25 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **35** | **10** | **$33,974** | **31** | **9** | **32,314** | **0.29** | **3** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **35** | **10** | **$33,974** | **31** | **9** | **32,314** | **0.29** | **3** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1277682

WOLFF INSURANCE AGENCY INC

Address: 520 PEOPLES PLZ

NEWARK DE 19702

Phone/Email: 3022831880 PETER@WOLFFINSURANCEAGENCY.COM

**DE**

# Agency Scorecard

## 1278364, CROW INSURANCE AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $43,414 | 74.2% | 11.9% | $30,816 | 24.7% | $3,775 | 9999.9% | 19 | 26.7% | 82.6% | $2,285 | 10/31/2025 |
| | Home | $6,640 | 18.1% | 14.6% | $6,640 | 21.8% | $0 | -100.0% | 6 | 20.0% | 100.0% | $1,107 | 10/31/2025 |
| | Marine | $177 | 9999.9% | 25.3% | $177 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $177 | 10/31/2025 |
| | Mobile Home | $16,868 | 8.8% | 23.4% | $8,648 | -24.1% | $0 | 0.0% | 15 | -6.3% | 88.2% | $1,125 | 10/31/2025 |
| | Motor Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $1,573 | 9999.9% | 12.5% | $482 | 9999.9% | $0 | 0.0% | 3 | 9999.9% | 100.0% | $524 | 10/31/2025 |
| | Off-Road Veh | $775 | -14.0% | 3.5% | $775 | -6.2% | $168 | 78.7% | 9 | 0.0% | 90.0% | $86 | 10/31/2025 |
| | Rental M.H. | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Travel Trailer | $6,536 | -1.8% | 11.4% | $6,536 | -1.8% | $8 | 9999.9% | 10 | 11.1% | 83.3% | $654 | 10/31/2025 |
| | **Total** | **$75,983** | **41.7%** | **15.0%** | **$54,074** | **10.2%** | **$3,951** | **34.4%** | **63** | **16.7%** | **87.5%** | **$1,206** | |
| **Total** | **Total** | **$75,983** | **41.7%** | **15.0%** | **$54,074** | **10.2%** | **$3,951** | **34.4%** | **63** | **16.7%** | **87.5%** | **$1,206** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 48 | 8 | $16,662 | 31 | 4 | $9,304 | 0.13 | 3 | 1 | $1,282 | 33.3% | 10/31/2025 |
| | Home | 9 | 1 | $502 | 4 | 1 | $502 | 0.25 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 2 | 1 | $182 | 2 | 1 | $182 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 3 | 1 | $483 | 3 | 1 | $483 | 0.33 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 2 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 5 | 3 | $1,573 | 2 | 1 | $482 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 1 | 1 | $75 | 1 | 1 | $75 | 1.00 | 1 | 1 | $75 | 100.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 5 | 3 | $2,291 | 5 | 3 | $2,291 | 0.60 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **75** | **18** | **$21,768** | **49** | **12** | **13,319** | **0.24** | **4** | **2** | **$1,357** | **50.0%** | |
| **Grand Total** | | **75** | **18** | **$21,768** | **49** | **12** | **13,319** | **0.24** | **4** | **2** | **$1,357** | **50.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Ben Flatau

Role: LBE

LBE UPN:1278364

CROW INSURANCE AGENCY INC

Address: 106 S BROAD ST

MIDDLETOWN DE 19709

Phone/Email: 3023789592 J.HENDRIX@CROWINSURANCETEAM.COM

**DE**

# Agency Scorecard

## 1278646, SHEETS INSURANCE AGENCY LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $61,510 | 107.6% | 29.5% | $58,595 | 115.2% | $11,532 | 378.7% | 32 | 60.0% | 88.9% | $1,922 | 10/31/2025 |
| | Home | $47,097 | 64.2% | 17.0% | $40,716 | 54.7% | $3,021 | -48.2% | 34 | 54.5% | 87.2% | $1,385 | 10/31/2025 |
| | Marine | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $12,399 | 11.3% | 22.1% | $10,705 | 10.6% | $1,287 | -1219.1% | 8 | 0.0% | 88.9% | $1,550 | 10/31/2025 |
| | Motorcycle | $4,570 | 96.3% | 7.1% | $4,570 | 96.3% | $0 | 0.0% | 3 | 0.0% | 75.0% | $1,523 | 10/31/2025 |
| | Off-Road Veh | $225 | 0.0% | 3.8% | $225 | 0.0% | $0 | 0.0% | 3 | 0.0% | 100.0% | $75 | 10/31/2025 |
| | Travel Trailer | $649 | -2.0% | 12.8% | $649 | -2.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $649 | 10/31/2025 |
| | **Total** | **$126,450** | **74.0%** | **22.8%** | **$115,460** | **73.8%** | **$15,840** | **95.0%** | **81** | **42.1%** | **88.0%** | **$1,561** | |
| **Total** | **Total** | **$126,450** | **74.0%** | **22.8%** | **$115,460** | **73.8%** | **$15,840** | **95.0%** | **81** | **42.1%** | **88.0%** | **$1,561** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 37 | 0 | $0 | 31 | 0 | $0 | 0.00 | 3 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **37** | **0** | **$0** | **31** | **0** | **0** | **0.00** | **3** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 67 | 16 | $34,483 | 56 | 15 | $32,801 | 0.27 | 9 | 3 | $8,694 | 33.3% | 10/31/2025 |
| | Home | 70 | 17 | $18,278 | 58 | 14 | $13,275 | 0.24 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 12 | 1 | $823 | 11 | 1 | $823 | 0.09 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 2 | 1 | $3,021 | 2 | 1 | $3,021 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **152** | **35** | **$56,605** | **128** | **31** | **49,920** | **0.24** | **11** | **3** | **$8,694** | **27.3%** | |
| **Grand Total** | | **189** | **35** | **$56,605** | **159** | **31** | **49,920** | **0.19** | **14** | **3** | **$8,694** | **21.4%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Ben Flatau

Role: LBE

LBE UPN:1278646

SHEETS INSURANCE AGENCY LLC

Address: 254 FOXHUNT DR

BEAR DE 19701

Phone/Email: 3028320441 KYLE@SHEETSINSURANCE.COM

**DE**

# Agency Scorecard

## 1281678, STEINEBACH, BEATY AND ASSOC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $43,840 | 12.3% | 12.7% | $36,962 | 13.6% | $582 | -93.3% | 32 | 39.1% | 80.0% | $1,370 | 10/31/2025 |
| | Home | $12,753 | 28.8% | 20.0% | $10,701 | 26.9% | $3,729 | 30.4% | 10 | 11.1% | 76.9% | $1,275 | 10/31/2025 |
| | Mobile Home | $7,493 | -2.2% | 21.4% | $6,160 | -10.3% | $0 | -100.0% | 9 | -10.0% | 75.0% | $833 | 10/31/2025 |
| | Motorcycle | $257 | 0.0% | 3.7% | $257 | 0.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $257 | 10/31/2025 |
| | Rental M.H. | $1,268 | 4.4% | 17.5% | $1,268 | 4.4% | $0 | 0.0% | 2 | 0.0% | 100.0% | $634 | 10/31/2025 |
| | Travel Trailer | $580 | -1.0% | 231.9% | $580 | -1.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $580 | 10/31/2025 |
| | **Total** | **$66,191** | **12.8%** | **17.5%** | **$55,928** | **12.1%** | **$4,311** | **-65.4%** | **55** | **19.6%** | **79.7%** | **$1,203** | |
| **Total** | **Total** | **$66,191** | **12.8%** | **17.5%** | **$55,928** | **12.1%** | **$4,311** | **-65.4%** | **55** | **19.6%** | **79.7%** | **$1,203** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 29 | 17 | $34,708 | 25 | 15 | $25,632 | 0.60 | 3 | 1 | $1,283 | 33.3% | 10/31/2025 |
| | Home | 7 | 4 | $3,890 | 5 | 2 | $2,058 | 0.40 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 6 | 2 | $1,785 | 5 | 2 | $1,785 | 0.40 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **43** | **23** | **$40,383** | **36** | **19** | **29,475** | **0.53** | **3** | **1** | **$1,283** | **33.3%** | |
| **Grand Total** | | **43** | **23** | **$40,383** | **36** | **19** | **29,475** | **0.53** | **3** | **1** | **$1,283** | **33.3%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1281678

STEINEBACH, BEATY AND ASSOC

Address: 18 PEDDLERS VILLAGE CTR

CHRISTIANA DE 19702

Phone/Email: 3023281212 MATT@SBAINSURANCEAGENCY.COM

**DE**

# Agency Scorecard

## 1326102, DEWBERRY INSURANCE AGENCY

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $1,534 | 224.3% | 5.9% | $1,534 | 224.3% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,534 | 10/31/2025 |
| | Home | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $16,849 | 20.0% | 83.1% | $15,708 | 20.4% | $956 | 9999.9% | 12 | 20.0% | 100.0% | $1,404 | 10/31/2025 |
| | Motor Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $2,507 | 37.6% | 24.2% | $2,507 | 37.6% | $0 | 0.0% | 1 | 0.0% | 100.0% | $2,507 | 10/31/2025 |
| | Travel Trailer | $209 | -1.4% | 12.0% | $209 | -1.4% | $0 | 0.0% | 1 | 0.0% | 100.0% | $209 | 10/31/2025 |
| | **Total** | **$21,099** | **22.3%** | **68.3%** | **$19,958** | **30.1%** | **$956** | **9999.9%** | **15** | **15.4%** | **100.0%** | **$1,407** | |
| **Total** | **Total** | **$21,099** | **22.3%** | **68.3%** | **$19,958** | **30.1%** | **$956** | **9999.9%** | **15** | **15.4%** | **100.0%** | **$1,407** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 9 | 0 | $0 | 9 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 5 | 2 | $1,975 | 4 | 2 | $1,975 | 0.50 | 1 | 1 | $956 | 100.0% | 10/31/2025 |
| | Motor Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **15** | **2** | **$1,975** | **14** | **2** | **1,975** | **0.14** | **2** | **1** | **$956** | **50.0%** | |
| **Grand Total** | | **15** | **2** | **$1,975** | **14** | **2** | **1,975** | **0.14** | **2** | **1** | **$956** | **50.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1326102

DEWBERRY INSURANCE AGENCY

Address: 5700 KIRKWOOD HWY STE 103

WILMINGTON DE 19808

Phone/Email: 3029959550 STEVEDEWBERRY@DEWBERRYINSURANCE.COM

# Agency Scorecard

**FL**

## 183739, KEYSTONE INSURANCE GROUP INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 999.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $123,899 | 204.6% | 53.8% | $110,018 | 170.5% | $8,321 | 24.1% | 21 | 110.0% | 65.6% | $5,900 | 10/31/2025 |
| | **Total** | **$123,899** | **204.6%** | **53.8%** | **$110,018** | **170.5%** | **$8,321** | **24.1%** | **21** | **110.0%** | **65.6%** | **$5,900** | |
| Foremost Choice | Off-Road Veh | $737 | -13.3% | 3.9% | $291 | -29.5% | $0 | 0.0% | 3 | 0.0% | 100.0% | $246 | 10/31/2025 |
| | **Total** | **$737** | **-13.3%** | **3.9%** | **$291** | **-29.5%** | **$0** | **0.0%** | **3** | **0.0%** | **100.0%** | **$246** | |
| **Total** | **Total** | **$124,636** | **200.1%** | **53.4%** | **$110,309** | **168.5%** | **$8,321** | **24.1%** | **24** | **84.6%** | **68.6%** | **$5,193** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 9 | 0 | $0 | 9 | 0 | $0 | 0.00 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 1,806 | 22 | $77,067 | 1,428 | 19 | $67,019 | 0.01 | 127 | 3 | $6,609 | 2.4% | 10/31/2025 |
| | **Total** | **1,815** | **22** | **$77,067** | **1,437** | **19** | **67,019** | **0.01** | **129** | **3** | **$6,609** | **2.3%** | |
| Foremost Choice | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **1,815** | **22** | **$77,067** | **1,437** | **19** | **67,019** | **0.01** | **129** | **3** | **$6,609** | **2.3%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: APMF-3039 Open

Role: LBE

LBE UPN:183739

KEYSTONE INSURANCE GROUP INC

Address: 21301 POWERLINE RD STE 312

BOCA RATON FL 33433

Phone/Email: 5618521445 ALBERT@KEYSTONE-INS.COM

# Agency Scorecard

**FL**

## 1092749, FX INSURANCE AGENCY LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Mobile Home | ($141) | -115.6% | 30.6% | ($141) | -115.6% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **($141)** | **-115.6%** | **30.6%** | **($141)** | **-115.6%** | **$0** | **0.0%** | **0** | **-100.0%** | **0.0%** | **$0** | |
| **Total** | **Total** | **($141)** | **-115.6%** | **30.6%** | **($141)** | **-115.6%** | **$0** | **0.0%** | **0** | **-100.0%** | **0.0%** | **$0** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: APMI-1042 Open

Role: SUB

LBE UPN:1278961

1278961

FX INSURANCE AGENCY LLC

Address: 210 SW 2ND ST

OKEECHOBEE FL 34974

Phone/Email: 8637635551 KELLY@MURRAYINSURANCESERVICES.COM

# Agency Scorecard

**FL**

## 1109752, EADVISORPRO PROPERTY & CASUALTY LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $19,295 | -30.8% | -2.6% | $20,950 | -25.2% | $9,719 | 58.4% | 6 | 0.0% | 46.2% | $3,216 | 10/31/2025 |
| | **Total** | **$19,295** | **-30.8%** | **-2.6%** | **$20,950** | **-25.2%** | **$9,719** | **58.4%** | **6** | **0.0%** | **46.2%** | **$3,216** | |
| **Total** | **Total** | **$19,295** | **-30.8%** | **-2.6%** | **$20,950** | **-25.2%** | **$9,719** | **58.4%** | **6** | **0.0%** | **46.2%** | **$3,216** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 3 | 0 | $0 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 197 | 7 | $19,362 | 140 | 6 | $18,579 | 0.04 | 22 | 4 | $12,367 | 18.2% | 10/31/2025 |
| | **Total** | **200** | **7** | **$19,362** | **143** | **6** | **18,579** | **0.04** | **22** | **4** | **$12,367** | **18.2%** | |
| **Grand Total** | | **200** | **7** | **$19,362** | **143** | **6** | **18,579** | **0.04** | **22** | **4** | **$12,367** | **18.2%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1109752

EADVISORPRO PROPERTY & CASUALTY LLC

Address: 3297 E OAKLAND PARK BLVD

FORT LAUDERDALE FL 33308

Phone/Email: 8008910515 SERVICE@EADVISORPRO.COM

# Agency Scorecard

**FL**

## 1278961, DARR SCHACKOW INSURANCE AGENCY LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $427,915 | 12.9% | 85.6% | $337,136 | 5.8% | $38,768 | 2.6% | 107 | -11.6% | 53.2% | $3,999 | 10/31/2025 |
| | **Total** | **$427,915** | **12.9%** | **85.6%** | **$337,136** | **5.8%** | **$38,768** | **2.6%** | **107** | **-11.6%** | **53.2%** | **$3,999** | |
| Foremost Choice | Dwelling Fire | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Marine | ($1,087) | 30.8% | -56.8% | ($1,087) | 30.8% | $0 | 0.0% | 1 | 0.0% | 50.0% | ($1,087) | 10/31/2025 |
| | Mobile Home | $470,742 | 0.4% | 58.1% | $390,325 | -0.1% | $33,464 | -4.4% | 175 | -10.7% | 89.3% | $2,690 | 10/31/2025 |
| | Motor Home | $2,094 | 12.1% | 13.5% | $1,904 | 13.5% | $0 | 0.0% | 3 | 0.0% | 100.0% | $698 | 10/31/2025 |
| | Motorcycle | $357 | -4.5% | 3.3% | $205 | -13.5% | $0 | 0.0% | 2 | 0.0% | 100.0% | $179 | 10/31/2025 |
| | Off-Road Veh | $1,961 | -32.1% | 0.2% | $1,601 | -41.9% | $349 | 2.3% | 9 | -25.0% | 75.0% | $218 | 10/31/2025 |
| | Rental M.H. | $9,754 | -35.0% | 30.3% | $7,568 | -36.6% | $0 | -100.0% | 12 | -45.5% | 54.5% | $813 | 10/31/2025 |
| | Travel Trailer | ($47) | -103.7% | -1.3% | ($47) | -103.7% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$483,774** | **-1.1%** | **56.6%** | **$400,469** | **-1.8%** | **$33,813** | **-7.5%** | **202** | **-14.8%** | **84.9%** | **$2,395** | |
| **Total** | **Total** | **$911,689** | **5.0%** | **70.2%** | **$737,605** | **1.5%** | **$72,581** | **-2.4%** | **309** | **-13.7%** | **70.4%** | **$2,950** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 3,439 | 80 | $139,007 | 2,846 | 64 | $107,826 | 0.02 | 277 | 7 | $9,490 | 2.5% | 10/31/2025 |
| | **Total** | **3,439** | **80** | **$139,007** | **2,846** | **64** | **107,826** | **0.02** | **277** | **7** | **$9,490** | **2.5%** | |
| Foremost Choice | Dwelling Fire | 9 | 0 | $0 | 9 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 2 | 1 | $477 | 2 | 1 | $477 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 13 | 0 | $0 | 10 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **25** | **1** | **$477** | **22** | **1** | **477** | **0.05** | **1** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **3,464** | **81** | **$139,484** | **2,868** | **65** | **108,303** | **0.02** | **278** | **7** | **$9,490** | **2.5%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Rick Thompson

Role: LBE

LBE UPN:1278961

DARR SCHACKOW INSURANCE AGENCY LLC

Address: 5200 NEWBERRY RD STE B

GAINESVILLE FL 32607

Phone/Email: 3523380552 INFO@DARRSCHACKOWINSURANCE.COM

# Agency Scorecard

**FL**

## 1364186, JOHN SENA AGENCY, INC.

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $11,502 | -50.3% | 20.7% | $11,502 | -51.9% | $1,013 | -201.1% | 3 | 50.0% | 60.0% | $3,834 | 10/31/2025 |
| | **Total** | **$11,502** | **-50.3%** | **20.7%** | **$11,502** | **-51.9%** | **$1,013** | **-201.1%** | **3** | **50.0%** | **60.0%** | **$3,834** | |
| Foremost Choice | Mobile Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Off-Road Veh | $617 | 3.5% | 4.9% | $617 | 3.5% | $0 | 0.0% | 1 | 0.0% | 100.0% | $617 | 10/31/2025 |
| | **Total** | **$617** | **3.5%** | **4.9%** | **$617** | **3.5%** | **$0** | **0.0%** | **1** | **0.0%** | **100.0%** | **$617** | |
| **Total** | **Total** | **$12,119** | **-49.0%** | **19.8%** | **$12,119** | **-50.6%** | **$1,013** | **-201.1%** | **4** | **33.3%** | **66.7%** | **$3,030** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 270 | 3 | $5,431 | 266 | 3 | $5,431 | 0.01 | 31 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **270** | **3** | **$5,431** | **266** | **3** | **5,431** | **0.01** | **31** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **270** | **3** | **$5,431** | **266** | **3** | **5,431** | **0.01** | **31** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner

Portfolio Owner: APMF-3039 Open

Role: LBE

LBE UPN:1364186

JOHN SENA AGENCY, INC.

Address: 6501 CONGRESS AVE STE 100

BOCA RATON FL 33487

Phone/Email: 5612914661 JSENA@THESENAGROUP.COM

# Agency Scorecard

**FL**

## 1364189, JOHN SENA AGENCY, INC.

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $15,855 | 24.7% | 4.6% | $15,855 | 24.7% | $2,394 | -20.4% | 4 | 100.0% | 80.0% | $3,964 | 10/31/2025 |
| | **Total** | **$15,855** | **24.7%** | **4.6%** | **$15,855** | **24.7%** | **$2,394** | **-20.4%** | **4** | **100.0%** | **80.0%** | **$3,964** | |
| **Total** | **Total** | **$15,855** | **24.7%** | **4.6%** | **$15,855** | **24.7%** | **$2,394** | **-20.4%** | **4** | **100.0%** | **80.0%** | **$3,964** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 351 | 3 | $3,846 | 281 | 3 | $3,846 | 0.01 | 23 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **351** | **3** | **$3,846** | **281** | **3** | **3,846** | **0.01** | **23** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **351** | **3** | **$3,846** | **281** | **3** | **3,846** | **0.01** | **23** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: APMF-3039 Open

Role: SUB

LBE UPN:1364186

1364186

JOHN SENA AGENCY, INC.

Address: 6501 CONGRESS AVE STE 100

BOCA RATON FL 33487

Phone/Email: 3058234086 JSENA@THESENAGROUP.COM

# Agency Scorecard

**FL**

## 1414450, DARR SCHACKOW INSURANCE AGENCY LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $44,444 | -22.8% | 13.5% | $44,273 | -21.9% | $3,219 | 27.3% | 6 | -14.3% | 85.7% | $7,407 | 10/31/2025 |
| | **Total** | **$44,444** | **-22.8%** | **13.5%** | **$44,273** | **-21.9%** | **$3,219** | **27.3%** | **6** | **-14.3%** | **85.7%** | **$7,407** | |
| Foremost Choice | Marine | $5,639 | -6.9% | 43.4% | $2,082 | -8.4% | $380 | 28.4% | 9 | -10.0% | 90.0% | $627 | 10/31/2025 |
| | Mobile Home | $78,748 | -2.9% | 33.3% | $56,773 | -18.0% | ($1,162) | -120.8% | 27 | -28.9% | 71.1% | $2,917 | 10/31/2025 |
| | Off-Road Veh | $289 | -43.2% | 2.4% | $34 | -86.5% | $0 | 0.0% | 1 | -50.0% | 50.0% | $289 | 10/31/2025 |
| | Rental M.H. | $1,430 | -49.1% | 28.4% | $1,430 | -49.1% | $0 | 0.0% | 2 | -33.3% | 66.7% | $715 | 10/31/2025 |
| | Travel Trailer | $5,772 | -59.3% | -0.8% | $4,322 | -64.4% | $0 | 0.0% | 7 | -41.7% | 58.3% | $825 | 10/31/2025 |
| | **Total** | **$91,878** | **-12.2%** | **29.9%** | **$64,641** | **-25.4%** | **($782)** | **-113.3%** | **46** | **-29.2%** | **70.8%** | **$1,997** | |
| **Total** | **Total** | **$136,322** | **-16.0%** | **25.1%** | **$108,914** | **-24.0%** | **$2,437** | **-71.0%** | **52** | **-27.8%** | **72.2%** | **$2,622** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: APMI-1042 Open

Role: SUB

LBE UPN:1278961

1278961

DARR SCHACKOW INSURANCE AGENCY LLC

Address: 210 SW 2ND ST

OKEECHOBEE FL 34974

Phone/Email: 8637635551 SNEWFIELD@DARRSCHACKOWINSURANCE.COM

GA

# Agency Scorecard

## 152154, THE GOLDEN ROOSTER LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $9,495 | 25.6% | -0.4% | $6,939 | 40.0% | $1,052 | -14.3% | 3 | 50.0% | 100.0% | $3,165 | 10/31/2025 |
| | **Total** | **$9,495** | **25.6%** | **-0.4%** | **$6,939** | **40.0%** | **$1,052** | **-14.3%** | **3** | **50.0%** | **100.0%** | **$3,165** | |
| Foremost Choice | Dwelling Fire | $141,388 | 36.9% | 16.4% | $113,474 | 30.1% | $9,369 | -18.4% | 68 | 36.0% | 75.6% | $2,079 | 10/31/2025 |
| | Home | $85,655 | -4.7% | 15.7% | $79,003 | -2.0% | $3,338 | 9999.9% | 45 | -13.5% | 86.5% | $1,903 | 10/31/2025 |
| | Mobile Home | $56,598 | 3.4% | 36.7% | $46,492 | -6.0% | $826 | -80.0% | 37 | 0.0% | 88.1% | $1,530 | 10/31/2025 |
| | Motor Home | $1,190 | 9999.9% | 23.9% | $1,190 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $1,190 | 10/31/2025 |
| | Rental M.H. | $41,710 | 15.0% | 15.7% | $40,030 | 18.6% | $7,684 | 44.6% | 54 | 5.9% | 76.1% | $772 | 10/31/2025 |
| | Travel Trailer | $497 | -0.6% | 16.5% | $497 | -0.6% | $0 | 0.0% | 1 | 0.0% | 100.0% | $497 | 10/31/2025 |
| | **Total** | **$327,038** | **14.9%** | **20.1%** | **$280,686** | **11.6%** | **$21,217** | **1.3%** | **206** | **7.9%** | **80.2%** | **$1,588** | |
| **Total** | **Total** | **$336,533** | **15.2%** | **19.5%** | **$287,625** | **12.1%** | **$22,269** | **0.5%** | **209** | **8.3%** | **80.4%** | **$1,610** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 682 | 1 | $2,810 | 550 | 1 | $2,810 | 0.00 | 51 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **682** | **1** | **$2,810** | **550** | **1** | **2,810** | **0.00** | **51** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 340 | 40 | $79,359 | 277 | 32 | $61,897 | 0.12 | 15 | 2 | $4,464 | 13.3% | 10/31/2025 |
| | Home | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 39 | 5 | $7,080 | 36 | 5 | $7,080 | 0.14 | 4 | 1 | $1,307 | 25.0% | 10/31/2025 |
| | Motor Home | 1 | 1 | $1,138 | 1 | 1 | $1,138 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 30 | 20 | $27,101 | 26 | 20 | $27,101 | 0.77 | 9 | 7 | $9,593 | 77.8% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **412** | **66** | **$114,678** | **342** | **58** | **97,216** | **0.17** | **28** | **10** | **$15,364** | **35.7%** | |
| **Grand Total** | | **1,094** | **67** | **$117,488** | **892** | **59** | **100,026** | **0.07** | **79** | **10** | **$15,364** | **12.7%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Taylor Smith

Role: LBE

LBE UPN:152154

THE GOLDEN ROOSTER LLC

Address: 102 NEAR WAY SW

GAINESVILLE GA 30501

Phone/Email: 6784508003 OCHOA@ELGALLOINS.COM

GA

# Agency Scorecard

## 1174210, ARCH PARTNERS INSURANCE

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $8,747 | -31.2% | 1.5% | $8,680 | -33.8% | $1,412 | -79.2% | 1 | -50.0% | 50.0% | $8,747 | 10/31/2025 |
| | **Total** | **$8,747** | **-31.2%** | **1.5%** | **$8,680** | **-33.8%** | **$1,412** | **-79.2%** | **1** | **-50.0%** | **50.0%** | **$8,747** | |
| Foremost Choice | Dwelling Fire | $37,742 | 42.4% | 12.9% | $38,584 | 96.4% | $7,679 | 580.8% | 18 | 28.6% | 81.8% | $2,097 | 10/31/2025 |
| | Home | $4,900 | -38.2% | 15.1% | $4,900 | -38.2% | $0 | 0.0% | 2 | -33.3% | 66.7% | $2,450 | 10/31/2025 |
| | Marine | $7,184 | -12.4% | 16.1% | $7,184 | -12.4% | ($123) | -196.9% | 13 | -13.3% | 81.3% | $553 | 10/31/2025 |
| | Mobile Home | $11,384 | -5.2% | 15.3% | $9,792 | -6.1% | $1,430 | -4.7% | 6 | 0.0% | 85.7% | $1,897 | 10/31/2025 |
| | Motor Home | $2,128 | -1.4% | 13.6% | $2,128 | -1.4% | $0 | 0.0% | 1 | 0.0% | 100.0% | $2,128 | 10/31/2025 |
| | Motorcycle | $673 | -0.1% | 4.3% | $673 | -0.1% | $0 | 0.0% | 2 | 0.0% | 100.0% | $337 | 10/31/2025 |
| | Off-Road Veh | $4,582 | 2.4% | 7.2% | $4,492 | 3.0% | ($130) | 0.0% | 12 | -20.0% | 80.0% | $382 | 10/31/2025 |
| | Rental M.H. | $27,824 | 18.2% | 19.1% | $16,700 | 7.9% | $0 | 0.0% | 9 | -10.0% | 81.8% | $3,092 | 10/31/2025 |
| | Travel Trailer | $480 | 5.0% | 12.7% | $480 | 5.0% | $0 | 0.0% | 2 | 100.0% | 66.7% | $240 | 10/31/2025 |
| | **Total** | **$96,897** | **12.7%** | **15.0%** | **$84,933** | **22.5%** | **$8,856** | **221.3%** | **65** | **-3.0%** | **81.3%** | **$1,491** | |
| **Total** | **Total** | **$105,644** | **7.1%** | **13.2%** | **$93,613** | **13.5%** | **$10,268** | **7.7%** | **66** | **-4.3%** | **80.5%** | **$1,601** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 4 | 0 | $0 | 3 | 0 | $0 | 0.00 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 11 | 0 | $0 | 8 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **15** | **0** | **$0** | **11** | **0** | **0** | **0.00** | **3** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 49 | 8 | $24,753 | 40 | 8 | $24,753 | 0.20 | 3 | 3 | $6,516 | 100.0% | 10/31/2025 |
| | Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 5 | 1 | $426 | 5 | 1 | $426 | 0.20 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 7 | 1 | $1,539 | 7 | 1 | $1,539 | 0.14 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 8 | 0 | $0 | 8 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 3 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 9 | 1 | $1,455 | 1 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 4 | 2 | $555 | 3 | 2 | $555 | 0.67 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **86** | **13** | **$28,728** | **67** | **12** | **27,273** | **0.18** | **5** | **3** | **$6,516** | **60.0%** | |
| **Grand Total** | | **101** | **13** | **$28,728** | **78** | **12** | **27,273** | **0.15** | **8** | **3** | **$6,516** | **37.5%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: APMF-3041 Open

Role: LBE

LBE UPN:1174210

ARCH PARTNERS INSURANCE

Address: 3651 MARS HILL RD STE 2100

WATKINSVILLE GA 30677

Phone/Email: 7068508877 INFO@ARCHPARTNERSINS.COM

GA

# Agency Scorecard

## 1184536, SOUTHERN LEGACY INSURANCE AGENCY

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $8,634 | -59.6% | 11.4% | $8,634 | -59.6% | $0 | 0.0% | 8 | -42.9% | 50.0% | $1,079 | 10/31/2025 |
| | Home | $1,652 | -79.5% | 11.6% | $2,187 | -65.7% | $2,187 | 6.9% | 2 | -33.3% | 66.7% | $826 | 10/31/2025 |
| | Marine | $152 | 0.0% | 16.8% | $152 | 0.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $152 | 10/31/2025 |
| | Mobile Home | $1,705 | 5.7% | 7.9% | $1,705 | 5.7% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,705 | 10/31/2025 |
| | Motorcycle | $1,180 | 4.4% | -2.4% | $1,180 | 4.4% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,180 | 10/31/2025 |
| | Off-Road Veh | $169 | -22.1% | 1.4% | $169 | -22.1% | $0 | 0.0% | 1 | -50.0% | 50.0% | $169 | 10/31/2025 |
| | Travel Trailer | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$13,492** | **-58.6%** | **10.4%** | **$14,027** | **-54.6%** | **$2,187** | **6.9%** | **14** | **-36.4%** | **58.3%** | **$964** | |
| **Total** | **Total** | **$13,492** | **-58.6%** | **10.4%** | **$14,027** | **-54.6%** | **$2,187** | **6.9%** | **14** | **-36.4%** | **58.3%** | **$964** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 23 | 2 | $2,478 | 20 | 2 | $2,478 | 0.10 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **26** | **2** | **$2,478** | **23** | **2** | **2,478** | **0.09** | **2** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **26** | **2** | **$2,478** | **23** | **2** | **2,478** | **0.09** | **2** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1184536

SOUTHERN LEGACY INSURANCE AGENCY

Address: 4 S TENNESSEE ST STE 104

CARTERSVILLE GA 30120

Phone/Email: 7708814933 SABRINA.SOUTHERNLEGACY@GMAIL.COM

GA

# Agency Scorecard

## 1202723, THE JABLONSKI GROUP

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $32,223 | -17.9% | 14.3% | $29,256 | 90.6% | $0 | -100.0% | 13 | -13.3% | 81.3% | $2,479 | 10/31/2025 |
| | Home | $4,109 | 10.9% | 16.9% | $4,109 | 10.9% | $0 | 0.0% | 2 | 0.0% | 100.0% | $2,055 | 10/31/2025 |
| | Mobile Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $433 | 7.4% | 14.9% | $433 | 7.4% | $0 | 0.0% | 1 | 0.0% | 100.0% | $433 | 10/31/2025 |
| | **Total** | **$36,765** | **-15.2%** | **14.6%** | **$33,798** | **73.7%** | **$0** | **-100.0%** | **16** | **-11.1%** | **84.2%** | **$2,298** | |
| **Total** | **Total** | **$36,765** | **-15.2%** | **14.6%** | **$33,798** | **73.7%** | **$0** | **-100.0%** | **16** | **-11.1%** | **84.2%** | **$2,298** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 4 | 1 | $1,983 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **4** | **1** | **$1,983** | **2** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **4** | **1** | **$1,983** | **2** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1202723

THE JABLONSKI GROUP

Address: 10 GLENLAKE PKWY STE 130

ATLANTA GA 30328

Phone/Email: 4049811519 DOLAN@THEOAKINSURANCEGROUP.COM

GA

# Agency Scorecard

## 1235444, THE INSURANCE CONNECTION, LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | ($2,226) | -122.9% | 1.4% | ($2,226) | -122.9% | $0 | -100.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **($2,226)** | **-122.9%** | **1.4%** | **($2,226)** | **-122.9%** | **$0** | **-100.0%** | **0** | **-100.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $6,796 | 313.9% | 12.8% | $5,433 | 233.7% | ($1,668) | 52.5% | 5 | 25.0% | 83.3% | $1,359 | 10/31/2025 |
| | Home | $1,456 | 25.2% | 17.2% | $1,456 | 25.2% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,456 | 10/31/2025 |
| | Mobile Home | $9,501 | 0.4% | 40.6% | $9,501 | -2.5% | $0 | -100.0% | 8 | 0.0% | 100.0% | $1,188 | 10/31/2025 |
| | Motorcycle | $1,060 | -24.7% | 3.8% | $1,060 | -24.7% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,060 | 10/31/2025 |
| | Rental M.H. | $2,594 | 4.0% | 13.0% | $2,594 | 4.0% | $0 | 0.0% | 3 | 0.0% | 100.0% | $865 | 10/31/2025 |
| | **Total** | **$21,407** | **32.4%** | **27.9%** | **$20,044** | **21.9%** | **($1,668)** | **-269.5%** | **18** | **5.9%** | **94.7%** | **$1,189** | |
| **Total** | **Total** | **$19,181** | **-25.9%** | **25.8%** | **$17,818** | **-31.9%** | **($1,668)** | **-130.4%** | **18** | **0.0%** | **90.0%** | **$1,066** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 110 | 0 | $0 | 95 | 0 | $0 | 0.00 | 10 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **110** | **0** | **$0** | **95** | **0** | **0** | **0.00** | **10** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 14 | 2 | $5,363 | 10 | 2 | $5,363 | 0.20 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 3 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **17** | **2** | **$5,363** | **12** | **2** | **5,363** | **0.17** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **127** | **2** | **$5,363** | **107** | **2** | **5,363** | **0.02** | **10** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1235444

THE INSURANCE CONNECTION, LLC

Address: 1727 MARS HILL RD NW STE 206

ACWORTH GA 30101

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GA

# Agency Scorecard

## 1259043, STANDARD FINANCIAL GROUP LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $2,906 | -805.3% | 18.0% | $2,906 | 9999.9% | $1,386 | 9999.9% | 1 | 9999.9% | 100.0% | $2,906 | 10/31/2025 |
| | Home | $1,954 | 20.1% | 16.4% | $1,954 | 20.1% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,954 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$4,860** | **300.0%** | **17.0%** | **$4,860** | **198.7%** | **$1,386** | **9999.9%** | **2** | **100.0%** | **100.0%** | **$2,430** | |
| **Total** | **Total** | **$4,860** | **300.0%** | **17.0%** | **$4,860** | **198.7%** | **$1,386** | **9999.9%** | **2** | **100.0%** | **100.0%** | **$2,430** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 256 | 0 | $0 | 213 | 0 | $0 | 0.00 | 25 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **256** | **0** | **$0** | **213** | **0** | **0** | **0.00** | **25** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 4 | 1 | $1,520 | 4 | 1 | $1,520 | 0.25 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **4** | **1** | **$1,520** | **4** | **1** | **1,520** | **0.25** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **260** | **1** | **$1,520** | **217** | **1** | **1,520** | **0.00** | **25** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1259043

STANDARD FINANCIAL GROUP LLC

Address: 490 BRADLEY DR STE A

FAYETTEVILLE GA 30214

Phone/Email: 7709977999 JASON@STANDARDFINANCIALGROUPLLC.COM

GA

# Agency Scorecard

## 1277193, JOHN HURST INSURANCE GROUP, INC.

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $19,959 | -1.3% | 13.6% | $16,217 | -0.4% | $12,532 | 3.4% | 14 | -6.7% | 93.3% | $1,426 | 10/31/2025 |
| | Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $8,077 | -3.9% | 15.3% | $5,208 | -13.7% | $877 | 9999.9% | 5 | -16.7% | 83.3% | $1,615 | 10/31/2025 |
| | Motorcycle | $1,246 | 0.6% | 4.4% | $1,246 | 0.6% | $0 | 0.0% | 2 | 0.0% | 100.0% | $623 | 10/31/2025 |
| | Rental M.H. | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$29,282** | **-2.0%** | **13.7%** | **$22,671** | **-3.8%** | **$13,409** | **10.6%** | **21** | **-8.7%** | **91.3%** | **$1,394** | |
| **Total** | **Total** | **$29,282** | **-2.0%** | **13.7%** | **$22,671** | **-3.8%** | **$13,409** | **10.6%** | **21** | **-8.7%** | **91.3%** | **$1,394** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1277193

JOHN HURST INSURANCE GROUP, INC.

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HIRAM GA 30141

Phone/Email: 7709431966 JOHN@HURSTINSURANCEAGENCY.ORG

GA

# Agency Scorecard

## 1277779, ESSIGMANN & ASSOC INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 999.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **999.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $55,972 | 18.9% | 12.5% | $48,486 | 13.7% | $3,313 | 1315.8% | 45 | 2.3% | 90.0% | $1,244 | 10/31/2025 |
| | Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Marine | $0 | -100.0% | 15.5% | $0 | -100.0% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $42,927 | 2.5% | 14.4% | $38,097 | 16.8% | $1,592 | 113.4% | 22 | -4.3% | 91.7% | $1,951 | 10/31/2025 |
| | Motorcycle | $556 | -50.1% | -4.5% | $1,082 | -2.9% | $504 | 9999.9% | 1 | -50.0% | 33.3% | $556 | 10/31/2025 |
| | Off-Road Veh | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $6,254 | -6.6% | 15.9% | $5,382 | -8.7% | $2,229 | 2.7% | 7 | 16.7% | 100.0% | $893 | 10/31/2025 |
| | Travel Trailer | $525 | -2.4% | 13.1% | $0 | 0.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $525 | 10/31/2025 |
| | **Total** | **$106,234** | **9.1%** | **13.3%** | **$93,047** | **13.1%** | **$7,638** | **142.4%** | **76** | **-1.3%** | **88.4%** | **$1,398** | |
| **Total** | **Total** | **$106,234** | **9.1%** | **13.3%** | **$93,047** | **13.1%** | **$7,638** | **142.4%** | **76** | **-1.3%** | **88.4%** | **$1,398** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 43 | 6 | $8,270 | 42 | 5 | $7,122 | 0.12 | 4 | 1 | $2,151 | 25.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 10 | 1 | $1,261 | 10 | 1 | $1,261 | 0.10 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 5 | 1 | $504 | 5 | 1 | $504 | 0.20 | 2 | 1 | $504 | 50.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 2 | 1 | $1,297 | 2 | 1 | $1,297 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 1 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **61** | **9** | **$11,332** | **59** | **8** | **10,184** | **0.14** | **7** | **2** | **$2,655** | **28.6%** | |
| **Grand Total** | | **61** | **9** | **$11,332** | **59** | **8** | **10,184** | **0.14** | **7** | **2** | **$2,655** | **28.6%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Taylor Smith

Role: LBE

LBE UPN:1277779

ESSIGMANN & ASSOC INC

Address: 3200 HOPELAND IND BLVD #400

POWDER SPRINGS GA 30127

Phone/Email: 7706347464 CHRIS@ESSIGMANNINS.COM

# Agency Scorecard

**GA**

## 1277956, ESSIGMANN & ASSOC INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $15,065 | 34.4% | 49.8% | $12,965 | 63.6% | $0 | -100.0% | 7 | 16.7% | 87.5% | $2,152 | 10/31/2025 |
| | Home | $378 | 0.5% | 13.1% | $378 | 0.5% | $0 | 0.0% | 1 | 0.0% | 100.0% | $378 | 10/31/2025 |
| | Marine | $2,669 | -3.4% | 17.5% | $2,669 | -3.4% | $0 | 0.0% | 5 | 0.0% | 100.0% | $534 | 10/31/2025 |
| | Mobile Home | $1,714 | 44.8% | 15.2% | $463 | 9999.9% | $0 | 0.0% | 1 | 0.0% | 50.0% | $1,714 | 10/31/2025 |
| | Motor Home | $2,394 | 14.5% | 13.0% | $2,394 | 14.5% | $0 | 0.0% | 1 | 0.0% | 100.0% | $2,394 | 10/31/2025 |
| | Motorcycle | $5,493 | -3.5% | 514.0% | $5,493 | -3.5% | $206 | 9999.9% | 4 | 33.3% | 100.0% | $1,373 | 10/31/2025 |
| | Off-Road Veh | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $1,671 | 172.6% | 17.5% | $1,671 | 172.6% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,671 | 10/31/2025 |
| | Travel Trailer | $1,251 | 86.4% | 14.1% | $1,251 | 271.2% | $0 | -100.0% | 4 | 100.0% | 80.0% | $313 | 10/31/2025 |
| | **Total** | **$30,635** | **24.5%** | **131.6%** | **$27,284** | **37.8%** | **$206** | **-80.1%** | **24** | **20.0%** | **88.9%** | **$1,276** | |
| **Total** | **Total** | **$30,635** | **24.5%** | **131.6%** | **$27,284** | **37.8%** | **$206** | **-80.1%** | **24** | **20.0%** | **88.9%** | **$1,276** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 32 | 2 | $3,068 | 31 | 2 | $3,068 | 0.06 | 3 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 3 | 1 | $1,714 | 3 | 1 | $1,714 | 0.33 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 2 | 1 | $206 | 2 | 1 | $206 | 0.50 | 1 | 1 | $206 | 100.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 3 | 3 | $816 | 3 | 3 | $816 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **40** | **7** | **$5,804** | **39** | **7** | **5,804** | **0.18** | **4** | **1** | **$206** | **25.0%** | |
| **Grand Total** | | **40** | **7** | **$5,804** | **39** | **7** | **5,804** | **0.18** | **4** | **1** | **$206** | **25.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Taylor Smith

Role: SUB

LBE UPN:1277779

1277779

ESSIGMANN & ASSOC INC

Address: 3200 HOPELAND INDUSTRIAL BLVD

POWDER SPRINGS GA 30127

Phone/Email: 7706347464 AGENCY@ESSIGMANNINS.COM

GA

# Agency Scorecard

## 1278912, SLATER INSURANCE AGENCY LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $13,315 | 164.4% | 13.9% | $13,315 | 164.4% | $0 | -100.0% | 6 | 20.0% | 100.0% | $2,219 | 10/31/2025 |
| | Home | $12,420 | 9.1% | 15.8% | $6,367 | -44.1% | $0 | 0.0% | 5 | 0.0% | 100.0% | $2,484 | 10/31/2025 |
| | **Total** | **$25,735** | **56.8%** | **14.8%** | **$19,682** | **19.9%** | **$0** | **-100.0%** | **11** | **10.0%** | **100.0%** | **$2,340** | |
| **Total** | **Total** | **$25,735** | **56.8%** | **14.8%** | **$19,682** | **19.9%** | **$0** | **-100.0%** | **11** | **10.0%** | **100.0%** | **$2,340** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 10 | 1 | $927 | 10 | 1 | $927 | 0.10 | 3 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **10** | **1** | **$927** | **10** | **1** | **927** | **0.10** | **3** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **10** | **1** | **$927** | **10** | **1** | **927** | **0.10** | **3** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1278912

SLATER INSURANCE AGENCY LLC

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MCDONOUGH GA 30253

Phone/Email: 4044746356 BRYAN@SLATERINSURANCEAGENCY.COM

GA

# Agency Scorecard

## 1279085, THE BATES INSURANCE GROUP INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $30,700 | 132.1% | 16.8% | $29,059 | 210.4% | $1,684 | 9999.9% | 15 | 50.0% | 100.0% | $2,047 | 10/31/2025 |
| | Home | $5,829 | 10.7% | 16.9% | $5,829 | 10.7% | $0 | 0.0% | 3 | 0.0% | 100.0% | $1,943 | 10/31/2025 |
| | Mobile Home | $26,696 | 3.7% | 14.9% | $18,909 | 27.3% | $0 | 0.0% | 14 | 7.7% | 93.3% | $1,907 | 10/31/2025 |
| | Motorcycle | $280 | 9999.9% | 12.5% | $280 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $280 | 10/31/2025 |
| | Off-Road Veh | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $6,736 | -18.5% | 16.4% | $7,915 | 7.3% | $992 | -69.8% | 6 | 0.0% | 85.7% | $1,123 | 10/31/2025 |
| | **Total** | **$70,241** | **33.8%** | **15.9%** | **$61,992** | **68.2%** | **$2,676** | **-18.6%** | **39** | **21.9%** | **95.1%** | **$1,801** | |
| **Total** | **Total** | **$70,241** | **33.8%** | **15.9%** | **$61,992** | **68.2%** | **$2,676** | **-18.6%** | **39** | **21.9%** | **95.1%** | **$1,801** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 17 | 5 | $12,550 | 13 | 4 | $10,909 | 0.31 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 4 | 2 | $4,645 | 2 | 2 | $4,645 | 1.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 1 | 1 | $280 | 1 | 1 | $280 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 2 | 1 | $1,585 | 1 | 1 | $1,585 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **24** | **9** | **$19,060** | **17** | **8** | **17,419** | **0.47** | **2** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **24** | **9** | **$19,060** | **17** | **8** | **17,419** | **0.47** | **2** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Ryan Kragt

Role: LBE

LBE UPN:1279085

THE BATES INSURANCE GROUP INC

Address: 6176 HIGHWAY 278 NE

COVINGTON GA 30014

Phone/Email: 7707864900 JACKIE@BATESIG.COM

GA

# Agency Scorecard

## 1279416, COVER ME GROUP LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $2,535 | -67.8% | 8.6% | $2,535 | -67.8% | $0 | -100.0% | 1 | -50.0% | 50.0% | $2,535 | 10/31/2025 |
| | Personal Auto | $3,013 | 2.6% | 1.4% | $4,999 | 37.7% | $0 | -100.0% | 1 | 0.0% | 33.3% | $3,013 | 10/31/2025 |
| | **Total** | **$5,548** | **-48.7%** | **6.5%** | **$7,534** | **-34.5%** | **$0** | **-100.0%** | **2** | **-33.3%** | **40.0%** | **$2,774** | |
| Foremost Choice | Dwelling Fire | $14,641 | 196.8% | -92.7% | $9,483 | 92.2% | $3,126 | 9999.9% | 7 | 133.3% | 87.5% | $2,092 | 10/31/2025 |
| | Home | $13,566 | -25.7% | 110.5% | $13,566 | -21.9% | $3,656 | 7.3% | 5 | -16.7% | 83.3% | $2,713 | 10/31/2025 |
| | Rental M.H. | $5,035 | 9.2% | 235.9% | $2,365 | 8.7% | $0 | 0.0% | 5 | 0.0% | 100.0% | $1,007 | 10/31/2025 |
| | **Total** | **$33,242** | **19.6%** | **74.6%** | **$25,414** | **3.8%** | **$6,782** | **99.1%** | **17** | **21.4%** | **89.5%** | **$1,955** | |
| **Total** | **Total** | **$38,790** | **0.5%** | **54.4%** | **$32,948** | **-8.5%** | **$6,782** | **0.9%** | **19** | **11.8%** | **79.2%** | **$2,042** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 3 | 0 | $0 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 119 | 2 | $5,849 | 106 | 2 | $5,849 | 0.02 | 13 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **122** | **2** | **$5,849** | **109** | **2** | **5,849** | **0.02** | **13** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 64 | 5 | $11,775 | 48 | 4 | $8,723 | 0.08 | 7 | 2 | $3,126 | 28.6% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **66** | **5** | **$11,775** | **50** | **4** | **8,723** | **0.08** | **7** | **2** | **$3,126** | **28.6%** | |
| **Grand Total** | | **188** | **7** | **$17,624** | **159** | **6** | **14,572** | **0.04** | **20** | **2** | **$3,126** | **10.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner

Portfolio Owner: Taylor Smith

Role: LBE

LBE UPN:1279416

COVER ME GROUP LLC

Address: 1922 HIGHWAY 74 N STE C

TYRONE GA 30290

Phone/Email: 6782537283 JB@BELIZAIREINSURANCE.BIZ

GA

# Agency Scorecard

## 1280762, M D FARMER ENTERPRISES INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $474 | 9999.9% | 18.8% | $474 | 9999.9% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $5,027 | -15.5% | 15.7% | $3,667 | -22.8% | ($1,372) | -535.6% | 3 | -25.0% | 75.0% | $1,676 | 10/31/2025 |
| | Rental M.H. | $210 | 7.1% | 15.1% | $210 | 7.1% | $0 | 0.0% | 1 | 0.0% | 100.0% | $210 | 10/31/2025 |
| | **Total** | **$5,711** | **-7.1%** | **15.9%** | **$4,351** | **-12.0%** | **($1,372)** | **-535.6%** | **4** | **-20.0%** | **66.7%** | **$1,428** | |
| **Total** | **Total** | **$5,711** | **-7.1%** | **15.9%** | **$4,351** | **-12.0%** | **($1,372)** | **-535.6%** | **4** | **-20.0%** | **66.7%** | **$1,428** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 2 | 1 | $2,930 | 2 | 1 | $2,930 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **2** | **1** | **$2,930** | **2** | **1** | **2,930** | **0.50** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **2** | **1** | **$2,930** | **2** | **1** | **2,930** | **0.50** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1280762

M D FARMER ENTERPRISES INC

Address: 3973 ATLANTA HWY STE 300

LOGANVILLE GA 30052

Phone/Email: 7705548711 FARMERM1@MISSYFARMERINSURANCE.COM

GA

# Agency Scorecard

## 1280813, M D FARMER ENTERPRISES INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $3,540 | -46.4% | 1.4% | $4,605 | -32.1% | $0 | -100.0% | 2 | -33.3% | 40.0% | $1,770 | 10/31/2025 |
| | **Total** | **$3,540** | **-46.4%** | **1.4%** | **$4,605** | **-32.1%** | **$0** | **-100.0%** | **2** | **-33.3%** | **40.0%** | **$1,770** | |
| Foremost Choice | Dwelling Fire | $9,204 | -2.3% | 14.4% | $7,174 | -6.3% | ($1,230) | 0.0% | 5 | -16.7% | 83.3% | $1,841 | 10/31/2025 |
| | Home | $2,429 | 23.2% | 13.9% | $2,429 | 23.2% | $0 | 0.0% | 1 | 0.0% | 100.0% | $2,429 | 10/31/2025 |
| | Marine | $396 | 9999.9% | 27.1% | $396 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $396 | 10/31/2025 |
| | Mobile Home | $58,168 | -5.4% | 14.9% | $46,931 | -4.4% | $3,760 | 17.2% | 34 | -2.9% | 94.4% | $1,711 | 10/31/2025 |
| | Rental M.H. | $12,833 | 1.9% | 14.8% | $10,622 | -15.7% | $815 | -60.2% | 14 | -6.7% | 93.3% | $917 | 10/31/2025 |
| | Travel Trailer | $1,171 | -3.9% | 14.6% | $1,171 | -3.9% | $0 | 0.0% | 2 | 0.0% | 100.0% | $586 | 10/31/2025 |
| | **Total** | **$84,201** | **-2.9%** | **14.8%** | **$68,723** | **-5.3%** | **$3,345** | **-36.4%** | **57** | **-3.4%** | **93.4%** | **$1,477** | |
| **Total** | **Total** | **$87,741** | **-5.9%** | **14.2%** | **$73,328** | **-7.6%** | **$3,345** | **-41.2%** | **59** | **-4.8%** | **89.4%** | **$1,487** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 21 | 2 | $1,097 | 16 | 2 | $1,097 | 0.13 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **21** | **2** | **$1,097** | **16** | **2** | **1,097** | **0.13** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 4 | 0 | $0 | 4 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 1 | 1 | $396 | 1 | 1 | $396 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 7 | 1 | $1,502 | 7 | 1 | $1,502 | 0.14 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **13** | **2** | **$1,898** | **13** | **2** | **1,898** | **0.15** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **34** | **4** | **$2,995** | **29** | **4** | **2,995** | **0.14** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: APMF-3041 Open

Role: SUB

LBE UPN:1280762

1280762

M D FARMER ENTERPRISES INC

Address: 40 BENSON ST

HARTWELL GA 30643

Phone/Email: 7063763144 FARMERM1@MISSYFARMERINSURANCE.COM

GA

# Agency Scorecard

## 1280814, AUSBAND CHAPMAN LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $37,039 | 607.0% | 237.1% | $35,753 | 582.4% | $13,827 | 437.0% | 7 | 250.0% | 53.8% | $5,291 | 10/31/2025 |
| | **Total** | **$37,039** | **544.2%** | **154.1%** | **$35,753** | **521.8%** | **$13,827** | **437.0%** | **7** | **250.0%** | **53.8%** | **$5,291** | |
| Foremost Choice | Dwelling Fire | $194,479 | 244.0% | 16.9% | $174,211 | 257.6% | ($5,224) | -292.5% | 75 | 97.4% | 96.2% | $2,593 | 10/31/2025 |
| | Home | $21,835 | -10.5% | 49.4% | $17,156 | 0.1% | $1,802 | 191.6% | 11 | -15.4% | 84.6% | $1,985 | 10/31/2025 |
| | Marine | $8,529 | 47.9% | 96.4% | $8,529 | 47.9% | ($15) | 0.0% | 18 | 100.0% | 120.0% | $474 | 10/31/2025 |
| | Mobile Home | $126,135 | 41.7% | 16.3% | $112,025 | 77.6% | $12,893 | 125.7% | 66 | 37.5% | 104.8% | $1,911 | 10/31/2025 |
| | Motor Home | $6,556 | 42.8% | 12.1% | $4,274 | 90.1% | $2,767 | 9999.9% | 4 | 33.3% | 100.0% | $1,639 | 10/31/2025 |
| | Motorcycle | $14,140 | 14.1% | -89.3% | $14,522 | 28.0% | $1,432 | 9999.9% | 20 | 25.0% | 95.2% | $707 | 10/31/2025 |
| | Off-Road Veh | $3,792 | 71.2% | 3.4% | $1,879 | 126.9% | $0 | 0.0% | 12 | 33.3% | 92.3% | $316 | 10/31/2025 |
| | Rental M.H. | $26,157 | 19.7% | 15.2% | $17,195 | -13.4% | ($632) | 0.0% | 15 | -6.3% | 71.4% | $1,744 | 10/31/2025 |
| | Travel Trailer | $9,033 | 184.4% | 475.7% | $7,471 | 182.8% | $2,040 | 562.3% | 16 | 166.7% | 114.3% | $565 | 10/31/2025 |
| | **Total** | **$410,656** | **86.7%** | **24.3%** | **$357,262** | **108.2%** | **$15,063** | **61.1%** | **237** | **50.0%** | **97.9%** | **$1,733** | |
| **Total** | **Total** | **$447,695** | **98.4%** | **32.4%** | **$393,015** | **121.6%** | **$28,890** | **142.2%** | **244** | **52.5%** | **95.7%** | **$1,835** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 1,845 | 11 | $29,353 | 1,602 | 10 | $28,583 | 0.01 | 157 | 2 | $6,262 | 1.3% | 10/31/2025 |
| | **Total** | **1,847** | **11** | **$29,353** | **1,604** | **10** | **28,583** | **0.01** | **157** | **2** | **$6,262** | **1.3%** | |
| Foremost Choice | Dwelling Fire | 227 | 40 | $114,893 | 199 | 36 | $110,530 | 0.18 | 17 | 2 | $3,791 | 11.8% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 14 | 6 | $2,766 | 14 | 6 | $2,766 | 0.43 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 48 | 15 | $28,142 | 45 | 15 | $28,142 | 0.33 | 3 | 1 | $2,624 | 33.3% | 10/31/2025 |
| | Motor Home | 6 | 1 | $1,548 | 6 | 1 | $1,548 | 0.17 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 22 | 5 | $3,732 | 20 | 5 | $3,732 | 0.25 | 4 | 1 | $618 | 25.0% | 10/31/2025 |
| | Off-Road Veh | 10 | 4 | $1,215 | 9 | 3 | $532 | 0.33 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 16 | 5 | $5,190 | 12 | 3 | $2,198 | 0.25 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 15 | 8 | $4,925 | 12 | 6 | $2,310 | 0.50 | 1 | 2 | $956 | 200.0% | 10/31/2025 |
| | **Total** | **358** | **84** | **$162,411** | **317** | **75** | **151,758** | **0.24** | **30** | **6** | **$7,989** | **20.0%** | |
| **Grand Total** | | **2,205** | **95** | **$191,764** | **1,921** | **85** | **180,341** | **0.04** | **187** | **8** | **$14,251** | **4.3%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Taylor Smith

Role: LBE

LBE UPN:1280814

AUSBAND CHAPMAN LLC

Address: 1123 WASHINGTON ST SW

COVINGTON GA 30014

Phone/Email: 7709225740 ALEC@ACINSURED.COM

# Agency Scorecard

**GA**

## 1280815, PLW & ASSOCIATES

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $12,355 | -1408.8% | 20.3% | $3,616 | 49.3% | $3,492 | -435.4% | 4 | 300.0% | 66.7% | $3,089 | 10/31/2025 |
| | Home | $3,833 | -18.4% | 15.0% | $4,118 | -12.3% | $0 | 0.0% | 1 | -50.0% | 50.0% | $3,833 | 10/31/2025 |
| | Mobile Home | $1,971 | -66.8% | 14.8% | $3,994 | -32.8% | $0 | 0.0% | 2 | -33.3% | 66.7% | $986 | 10/31/2025 |
| | Motor Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $1,821 | -35.7% | -0.3% | $2,057 | -27.3% | $0 | -100.0% | 2 | -33.3% | 66.7% | $911 | 10/31/2025 |
| | Rental M.H. | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Travel Trailer | $475 | -4.2% | 13.2% | $475 | -4.2% | $0 | 0.0% | 1 | 0.0% | 100.0% | $475 | 10/31/2025 |
| | **Total** | **$20,455** | **57.0%** | **15.1%** | **$14,260** | **-13.0%** | **$3,492** | **-341.0%** | **10** | **0.0%** | **66.7%** | **$2,046** | |
| **Total** | **Total** | **$20,455** | **57.0%** | **15.1%** | **$14,260** | **-13.0%** | **$3,492** | **-341.0%** | **10** | **0.0%** | **66.7%** | **$2,046** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 1 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **2** | **0** | **$0** | **1** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 37 | 5 | $10,236 | 22 | 2 | $1,497 | 0.09 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 6 | 0 | $0 | 4 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **45** | **5** | **$10,236** | **27** | **2** | **1,497** | **0.07** | **1** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **47** | **5** | **$10,236** | **28** | **2** | **1,497** | **0.07** | **1** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1280815

PLW & ASSOCIATES

Address: 976 E FREEWAY DR SE STE B

CONYERS GA 30094

Phone/Email: 7707612111 WALKERP8@PLWINSURED.COM

GA

# Agency Scorecard

## 1287379, R M BUSH & COMPANY

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | -100.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **-100.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $1,783 | -297.2% | 15.5% | $1,783 | -297.2% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $1,783 | 10/31/2025 |
| | Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Marine | $7,069 | 296.0% | 20.8% | $7,069 | 296.0% | $0 | 0.0% | 2 | 100.0% | 100.0% | $3,535 | 10/31/2025 |
| | Mobile Home | $42,135 | 46.0% | 74.8% | $27,359 | 28.2% | ($10) | -100.6% | 20 | -4.8% | 87.0% | $2,107 | 10/31/2025 |
| | Motorcycle | $2,244 | 18.7% | 5.6% | $1,867 | -1.2% | $0 | 0.0% | 2 | 100.0% | 100.0% | $1,122 | 10/31/2025 |
| | Off-Road Veh | $1,514 | -10.5% | 3.9% | $932 | -16.9% | $0 | 0.0% | 9 | 0.0% | 90.0% | $168 | 10/31/2025 |
| | Rental M.H. | $3,436 | 24.6% | 17.1% | $3,147 | 26.4% | $0 | 0.0% | 4 | 0.0% | 100.0% | $859 | 10/31/2025 |
| | **Total** | **$58,181** | **61.3%** | **60.2%** | **$42,157** | **52.0%** | **($10)** | **-100.6%** | **38** | **5.6%** | **90.5%** | **$1,531** | |
| **Total** | **Total** | **$58,181** | **70.4%** | **60.2%** | **$42,157** | **52.0%** | **($10)** | **-100.6%** | **38** | **5.6%** | **90.5%** | **$1,531** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 25 | 1 | $1,783 | 25 | 1 | $1,783 | 0.04 | 3 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 1 | 1 | $5,284 | 1 | 1 | $5,284 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 5 | 2 | $9,343 | 5 | 1 | $2,128 | 0.20 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 2 | 1 | $377 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 3 | 1 | $399 | 3 | 1 | $399 | 0.33 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 6 | 0 | $0 | 6 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **42** | **6** | **$17,186** | **40** | **4** | **9,594** | **0.10** | **4** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **42** | **6** | **$17,186** | **40** | **4** | **9,594** | **0.10** | **4** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1287379

R M BUSH & COMPANY

Address: 340 EISENHOWER DR STE 300A

SAVANNAH GA 31406

Phone/Email: 9123560266 MITCHELL@THEBUSHAGENCY.COM

GA

# Agency Scorecard

## 1289790, MARKETPLACE 4 INSURANCE, LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $479,704 | -8.5% | 6.1% | $422,052 | -8.5% | $36,268 | -10.2% | 323 | -8.2% | 82.4% | $1,485 | 10/31/2025 |
| | Home | $80,502 | 74.7% | 25.7% | $72,062 | 69.2% | $5,754 | -37.1% | 27 | 50.0% | 93.1% | $2,982 | 10/31/2025 |
| | Marine | $11,765 | -4.5% | 17.1% | $10,362 | -5.2% | $0 | 0.0% | 13 | -18.8% | 76.5% | $905 | 10/31/2025 |
| | Mobile Home | $322,688 | -10.6% | 22.4% | $275,312 | -10.3% | $24,893 | 10.8% | 212 | -12.4% | 85.1% | $1,522 | 10/31/2025 |
| | Motor Home | $8,962 | -1.0% | 8.5% | $8,962 | -1.0% | $0 | 0.0% | 6 | 0.0% | 100.0% | $1,494 | 10/31/2025 |
| | Motorcycle | $4,678 | 56.4% | 3.4% | $4,582 | 34.7% | $696 | 19.8% | 10 | 42.9% | 90.9% | $468 | 10/31/2025 |
| | Off-Road Veh | $8,668 | -32.8% | 2.4% | $9,384 | -22.8% | $991 | -34.6% | 64 | -5.9% | 83.1% | $135 | 10/31/2025 |
| | Rental M.H. | $72,357 | 10.8% | 40.6% | $66,423 | 14.3% | $2,589 | 14.0% | 64 | 0.0% | 92.8% | $1,131 | 10/31/2025 |
| | Travel Trailer | $13,085 | 55.4% | 491.8% | $10,433 | 7.8% | $483 | 3.0% | 19 | -9.5% | 63.3% | $689 | 10/31/2025 |
| | **Total** | **$1,002,409** | **-3.8%** | **21.2%** | **$879,572** | **-3.8%** | **$71,674** | **-6.8%** | **738** | **-7.1%** | **83.9%** | **$1,358** | |
| **Total** | **Total** | **$1,002,409** | **-3.8%** | **21.2%** | **$879,572** | **-3.8%** | **$71,674** | **-6.8%** | **738** | **-7.1%** | **83.9%** | **$1,358** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | 255 | 40 | $63,241 | 209 | 33 | $55,870 | 0.16 | 16 | 6 | $12,042 | 37.5% | 10/31/2025 |
| | Home | 68 | 11 | $23,317 | 61 | 9 | $19,157 | 0.15 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 3 | 1 | $1,134 | 3 | 1 | $1,134 | 0.33 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 70 | 7 | $10,719 | 58 | 5 | $7,445 | 0.09 | 6 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 7 | 4 | $1,889 | 5 | 3 | $1,793 | 0.60 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 17 | 9 | $1,403 | 16 | 8 | $1,315 | 0.50 | 2 | 1 | $234 | 50.0% | 10/31/2025 |
| | Rental M.H. | 22 | 5 | $5,520 | 20 | 5 | $5,520 | 0.25 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 20 | 9 | $8,382 | 18 | 7 | $6,187 | 0.39 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **463** | **86** | **$115,605** | **391** | **71** | **98,421** | **0.18** | **28** | **7** | **$12,276** | **25.0%** | |
| **Grand Total** | | **463** | **86** | **$115,605** | **391** | **71** | **98,421** | **0.18** | **28** | **7** | **$12,276** | **25.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Taylor Smith

Role: LBE

LBE UPN:1289790

MARKETPLACE 4 INSURANCE, LLC

Address: 297 RIVER LAUREL WAY

WOODSTOCK GA 30188

Phone/Email: 8008624156 INFO@MARKETPLACE4INS.COM

GA

# Agency Scorecard

## 1290025, LSH INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $919 | -79.3% | 1311.8% | $3,332 | -25.0% | $0 | -100.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$919** | **-79.3%** | **1311.8%** | **$3,332** | **-25.0%** | **$0** | **-100.0%** | **0** | **-100.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $20,313 | 36.1% | 15.2% | $20,313 | 57.3% | $0 | 0.0% | 6 | 0.0% | 85.7% | $3,386 | 10/31/2025 |
| | Home | $15,862 | -6.8% | 15.0% | $12,237 | -3.7% | $2,721 | 6.5% | 6 | 0.0% | 100.0% | $2,644 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$36,175** | **13.2%** | **15.1%** | **$32,550** | **27.1%** | **$2,721** | **6.5%** | **12** | **0.0%** | **92.3%** | **$3,015** | |
| **Total** | **Total** | **$37,094** | **1.9%** | **162.4%** | **$35,882** | **19.4%** | **$2,721** | **-20.2%** | **12** | **-7.7%** | **75.0%** | **$3,091** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 353 | 2 | $2,740 | 292 | 2 | $2,740 | 0.01 | 11 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **353** | **2** | **$2,740** | **292** | **2** | **2,740** | **0.01** | **11** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 36 | 1 | $2,301 | 32 | 1 | $2,301 | 0.03 | 4 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **36** | **1** | **$2,301** | **32** | **1** | **2,301** | **0.03** | **4** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **389** | **3** | **$5,041** | **324** | **3** | **5,041** | **0.01** | **15** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner
Portfolio Owner: Ryan Kragt
Role: LBE
LBE UPN:1290025

LSH INC
Address: 2361 DEKALB MED PKWY STE 101
LITHONIA GA 30058
Phone/Email: 6789371683 LARRY@HARRISINSURANCEFIRM.COM

GA

# Agency Scorecard

## 1290026, LSH INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $16,319 | 27.0% | 1.4% | $14,872 | 25.4% | $1,237 | -71.0% | 7 | 40.0% | 53.8% | $2,331 | 10/31/2025 |
| | **Total** | **$16,319** | **27.0%** | **1.4%** | **$14,872** | **25.4%** | **$1,237** | **-71.0%** | **7** | **40.0%** | **53.8%** | **$2,331** | |
| Foremost Choice | Dwelling Fire | $56,205 | 4.0% | 19.8% | $38,890 | 0.0% | $5,347 | 76.8% | 38 | -5.0% | 84.4% | $1,479 | 10/31/2025 |
| | Home | $9,133 | -15.6% | 14.5% | $6,778 | -17.2% | $0 | 0.0% | 3 | 0.0% | 100.0% | $3,044 | 10/31/2025 |
| | Mobile Home | ($262) | -124.3% | 15.9% | $942 | -55.6% | $0 | 0.0% | 1 | -50.0% | 50.0% | ($262) | 10/31/2025 |
| | Rental M.H. | $673 | -30.5% | 14.4% | $335 | -48.9% | $673 | 2.6% | 1 | -50.0% | 50.0% | $673 | 10/31/2025 |
| | **Total** | **$65,749** | **-1.7%** | **19.0%** | **$46,945** | **-5.8%** | **$6,020** | **63.6%** | **43** | **-8.5%** | **82.7%** | **$1,529** | |
| **Total** | **Total** | **$82,068** | **2.9%** | **15.7%** | **$61,817** | **0.2%** | **$7,257** | **-8.7%** | **50** | **-3.8%** | **76.9%** | **$1,641** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 262 | 8 | $13,956 | 209 | 7 | $11,700 | 0.03 | 30 | 2 | $1,188 | 6.7% | 10/31/2025 |
| | **Total** | **262** | **8** | **$13,956** | **209** | **7** | **11,700** | **0.03** | **30** | **2** | **$1,188** | **6.7%** | |
| Foremost Choice | Dwelling Fire | 49 | 5 | $10,099 | 44 | 3 | $6,478 | 0.07 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **49** | **5** | **$10,099** | **44** | **3** | **6,478** | **0.07** | **2** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **311** | **13** | **$24,055** | **253** | **10** | **18,178** | **0.04** | **32** | **2** | **$1,188** | **6.3%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner Portfolio Owner: Ryan Kragt LSH INC

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100 Role: SUB Address: 2801 OLD DAWSON RD STE 150

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100 LBE UPN:1290025 ALBANY GA 31707

Annual Average Premium = This Yr R12 NWP / PIF 1290025 Phone/Email: 2294321561 LARRY@HARRISINSURANCEFIRM.COM

GA

# Agency Scorecard

## 1290143, STRICKLAND ADVISORY GROUP INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $339 | -83.1% | 1.4% | $339 | -83.1% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$339** | **-83.1%** | **1.4%** | **$339** | **-83.1%** | **$0** | **0.0%** | **0** | **-100.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $66,529 | 126.4% | 59.9% | $47,334 | 80.5% | $2,097 | -19.8% | 25 | 92.3% | 67.6% | $2,661 | 10/31/2025 |
| | Home | $5,894 | -49.9% | 12.9% | $2,393 | -75.9% | $0 | 0.0% | 4 | -20.0% | 80.0% | $1,474 | 10/31/2025 |
| | Mobile Home | $11,202 | -6.4% | 23.7% | $8,957 | 2.9% | $1,820 | -40.0% | 6 | 0.0% | 75.0% | $1,867 | 10/31/2025 |
| | Motorcycle | $1,905 | -38.4% | -3.9% | $652 | -63.0% | $947 | -3.1% | 2 | -33.3% | 66.7% | $953 | 10/31/2025 |
| | Rental M.H. | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Travel Trailer | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$85,530** | **52.2%** | **46.3%** | **$59,336** | **27.3%** | **$4,864** | **-26.6%** | **37** | **37.0%** | **69.8%** | **$2,312** | |
| **Total** | **Total** | **$85,869** | **47.5%** | **45.2%** | **$59,675** | **22.8%** | **$4,864** | **-26.6%** | **37** | **32.1%** | **68.5%** | **$2,321** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 130 | 0 | $0 | 116 | 0 | $0 | 0.00 | 11 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **130** | **0** | **$0** | **116** | **0** | **0** | **0.00** | **11** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 86 | 24 | $57,694 | 74 | 19 | $40,510 | 0.26 | 7 | 1 | $1,165 | 14.3% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 9 | 2 | $3,407 | 9 | 2 | $3,407 | 0.22 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **96** | **26** | **$61,101** | **84** | **21** | **43,917** | **0.25** | **7** | **1** | **$1,165** | **14.3%** | |
| **Grand Total** | | **226** | **26** | **$61,101** | **200** | **21** | **43,917** | **0.11** | **18** | **1** | **$1,165** | **5.6%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Taylor Smith

Role: LBE

LBE UPN:1290143

STRICKLAND ADVISORY GROUP INC

Address: 115 COMMERCE DR STE G

FAYETTEVILLE GA 30214

Phone/Email: 7704613423

DEXTER.STRICKLAND@STRICKLANDADVISORYGROUP.COM

GA

# Agency Scorecard

## 1290867, ESSIGMANN & ASSOC INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Mobile Home | ($253) | -116.4% | 8.9% | ($253) | -116.4% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **($253)** | **-116.4%** | **8.9%** | **($253)** | **-116.4%** | **$0** | **0.0%** | **0** | **-100.0%** | **0.0%** | **$0** | |
| **Total** | **Total** | **($253)** | **-116.4%** | **8.9%** | **($253)** | **-116.4%** | **$0** | **0.0%** | **0** | **-100.0%** | **0.0%** | **$0** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: SUB

LBE UPN:1277779

1277779

ESSIGMANN & ASSOC INC

Address: 95 ROCK CREEK RD

TOCCOA GA 30577

Phone/Email: 7067169943 AGENCY@ESSIGMANNINS.COM

# Agency Scorecard

**GA**

## 1310095, KHANS INSURANCE COMPANY

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **-100.0%** | **0.0%** | **$0** | **-100.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $40,318 | 2.1% | 13.6% | $33,643 | -1.4% | ($1,741) | -220.8% | 17 | -22.7% | 60.7% | $2,372 | 10/31/2025 |
| | Home | $2,741 | 5.1% | 36.8% | $2,741 | 5.1% | $0 | 0.0% | 2 | 0.0% | 100.0% | $1,371 | 10/31/2025 |
| | Mobile Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $395 | 0.0% | -5.0% | $395 | 0.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $395 | 10/31/2025 |
| | Rental M.H. | $21,009 | -52.4% | 36.9% | $4,329 | -89.9% | ($5,784) | -267.4% | 17 | -32.0% | 56.7% | $1,236 | 10/31/2025 |
| | **Total** | **$64,463** | **-25.6%** | **25.6%** | **$41,108** | **-48.7%** | **($7,525)** | **-253.7%** | **37** | **-26.0%** | **60.7%** | **$1,742** | |
| **Total** | **Total** | **$64,463** | **-25.1%** | **25.6%** | **$41,108** | **-48.3%** | **($7,525)** | **-253.7%** | **37** | **-26.0%** | **60.7%** | **$1,742** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 29 | 6 | $13,387 | 27 | 5 | $12,259 | 0.19 | 5 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 6 | 5 | $1,975 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **35** | **11** | **$15,362** | **28** | **5** | **12,259** | **0.18** | **5** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **35** | **11** | **$15,362** | **28** | **5** | **12,259** | **0.18** | **5** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1310095

KHANS INSURANCE COMPANY

Address: 10360 VETERANS MEMORIAL HWY

LITHIA SPRINGS GA 30122

Phone/Email: 7707497744 KHAN@KHANSAGENCY.COM

GA

# Agency Scorecard

## 1316616, PROVIDENCE INSURANCE ADVISORS

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $19,631 | 104.3% | 18.4% | $21,593 | 103.8% | $888 | -87.1% | 8 | 100.0% | 100.0% | $2,454 | 10/31/2025 |
| | Home | $12,473 | 17.0% | 16.7% | $12,473 | 17.0% | $0 | 0.0% | 4 | 0.0% | 100.0% | $3,118 | 10/31/2025 |
| | Marine | $2,947 | 5.1% | 17.6% | $2,947 | 5.1% | $0 | 0.0% | 6 | 0.0% | 100.0% | $491 | 10/31/2025 |
| | Mobile Home | $17,279 | 59.6% | 17.5% | $13,452 | 43.0% | $0 | 0.0% | 9 | 80.0% | 112.5% | $1,920 | 10/31/2025 |
| | Motor Home | $1,251 | -90.1% | -4.1% | ($4,353) | -198.4% | $1,507 | 12.1% | 2 | -66.7% | 33.3% | $626 | 10/31/2025 |
| | Motorcycle | $11,231 | -17.8% | 158.7% | $9,423 | -21.2% | $921 | -4.7% | 20 | -16.7% | 66.7% | $562 | 10/31/2025 |
| | Off-Road Veh | $2,496 | 16.6% | 4.3% | $2,421 | 13.1% | $0 | -100.0% | 9 | 28.6% | 100.0% | $277 | 10/31/2025 |
| | Rental M.H. | $2,370 | 7.0% | 15.0% | $0 | -100.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $2,370 | 10/31/2025 |
| | Travel Trailer | $697 | 145.4% | 11.2% | $697 | 310.0% | $0 | 0.0% | 1 | 0.0% | 50.0% | $697 | 10/31/2025 |
| | **Total** | **$70,375** | **8.4%** | **43.8%** | **$58,653** | **7.9%** | **$3,316** | **-64.8%** | **60** | **3.4%** | **81.1%** | **$1,173** | |
| **Total** | **Total** | **$70,375** | **8.4%** | **43.8%** | **$58,653** | **7.9%** | **$3,316** | **-64.8%** | **60** | **3.4%** | **81.1%** | **$1,173** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 1,173 | 0 | $0 | 1,120 | 0 | $0 | 0.00 | 141 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **1,173** | **0** | **$0** | **1,120** | **0** | **0** | **0.00** | **141** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 52 | 4 | $15,652 | 35 | 4 | $15,652 | 0.11 | 2 | 1 | $5,579 | 50.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 6 | 3 | $4,860 | 4 | 2 | $2,503 | 0.50 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 12 | 6 | $3,863 | 9 | 5 | $3,047 | 0.56 | 3 | 1 | $483 | 33.3% | 10/31/2025 |
| | Off-Road Veh | 5 | 2 | $181 | 4 | 2 | $181 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 3 | 0 | $0 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 2 | 1 | $783 | 2 | 1 | $783 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **83** | **16** | **$25,339** | **60** | **14** | **22,166** | **0.23** | **7** | **2** | **$6,062** | **28.6%** | |
| **Grand Total** | | **1,256** | **16** | **$25,339** | **1,180** | **14** | **22,166** | **0.01** | **148** | **2** | **$6,062** | **1.4%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Taylor Smith

Role: LBE

LBE UPN:1316616

PROVIDENCE INSURANCE ADVISORS

Address: 291 E MAIN ST

CANTON GA 30114

Phone/Email: 7708248000 SERVICE@PROVIDENCEPROTECTS.COM

GA

# Agency Scorecard

## 1320229, INSURANCE GALLERY ASSOCIATES LIMITED LIABILTYCOMPANY

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $77,061 | 212.3% | 1.1% | $55,147 | 156.1% | $2,623 | -696.1% | 14 | 366.7% | 70.0% | $5,504 | 10/31/2025 |
| | **Total** | **$77,061** | **212.3%** | **1.1%** | **$55,147** | **156.1%** | **$2,623** | **-696.1%** | **14** | **366.7%** | **70.0%** | **$5,504** | |
| Foremost Choice | Dwelling Fire | $27,557 | 51.4% | 19.2% | $28,544 | 54.8% | $0 | -100.0% | 22 | 37.5% | 91.7% | $1,253 | 10/31/2025 |
| | Home | $3,802 | 10.2% | 18.5% | $3,802 | 10.2% | $0 | 0.0% | 2 | 0.0% | 100.0% | $1,901 | 10/31/2025 |
| | Mobile Home | $10,991 | -1.7% | 62.5% | $8,724 | 14.4% | $0 | 0.0% | 7 | 16.7% | 100.0% | $1,570 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$42,350** | **29.0%** | **32.8%** | **$41,070** | **39.1%** | **$0** | **-100.0%** | **31** | **29.2%** | **93.9%** | **$1,366** | |
| **Total** | **Total** | **$119,411** | **107.6%** | **12.0%** | **$96,217** | **88.5%** | **$2,623** | **19.3%** | **45** | **66.7%** | **84.9%** | **$2,654** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 74 | 17 | $34,812 | 62 | 16 | $33,851 | 0.26 | 8 | 2 | $3,881 | 25.0% | 10/31/2025 |
| | **Total** | **76** | **17** | **$34,812** | **64** | **16** | **33,851** | **0.25** | **8** | **2** | **$3,881** | **25.0%** | |
| Foremost Choice | Dwelling Fire | 27 | 8 | $14,593 | 22 | 8 | $14,593 | 0.36 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 4 | 1 | $521 | 4 | 1 | $521 | 0.25 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **31** | **9** | **$15,114** | **26** | **9** | **15,114** | **0.35** | **2** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **107** | **26** | **$49,926** | **90** | **25** | **48,965** | **0.28** | **10** | **2** | **$3,881** | **20.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner

Portfolio Owner: Ryan Kragt

Role: LBE

LBE UPN:1320229

INSURANCE GALLERY ASSOCIATES LIMITED LIABILTYCOMPANY

Address: 102 8TH ST E

TIFTON GA 31794

Phone/Email: 2294341182 IGA@FRIENDLYCITY.NET

GA

# Agency Scorecard

## 1320407, SELECT PREMIUM INS AGENCY DBA METRO CHOICE INS AGENCY

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | ($352) | -105.6% | -129.8% | $0 | -100.0% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **($352)** | **-105.6%** | **-129.8%** | **$0** | **-100.0%** | **$0** | **0.0%** | **0** | **-100.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $136,209 | 130.5% | 24.4% | $122,979 | 118.1% | $14,529 | -6.9% | 72 | 111.8% | 75.0% | $1,892 | 10/31/2025 |
| | Home | $71,407 | -10.1% | 74.6% | $62,382 | -5.1% | $7,711 | 12.8% | 36 | -14.3% | 85.7% | $1,984 | 10/31/2025 |
| | Mobile Home | $33,415 | 17.6% | 16.1% | $29,586 | 4.5% | $1,108 | -18.9% | 19 | -5.0% | 82.6% | $1,759 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Off-Road Veh | $0 | -100.0% | 11.7% | $0 | -100.0% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $2,200 | -23.7% | 25.1% | $2,200 | -23.7% | $0 | -100.0% | 3 | -25.0% | 75.0% | $733 | 10/31/2025 |
| | **Total** | **$243,231** | **43.1%** | **41.6%** | **$217,147** | **41.5%** | **$23,348** | **-4.2%** | **130** | **28.7%** | **78.3%** | **$1,871** | |
| **Total** | **Total** | **$242,879** | **37.8%** | **41.7%** | **$217,147** | **38.2%** | **$23,348** | **-4.2%** | **130** | **27.5%** | **77.8%** | **$1,868** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 10 | 0 | $0 | 9 | 0 | $0 | 0.00 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **12** | **0** | **$0** | **11** | **0** | **0** | **0.00** | **2** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 333 | 62 | $123,731 | 283 | 56 | $109,978 | 0.20 | 19 | 3 | $6,929 | 15.8% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 4 | 3 | $4,454 | 2 | 2 | $2,356 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 3 | 0 | $0 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **340** | **65** | **$128,185** | **288** | **58** | **112,334** | **0.20** | **19** | **3** | **$6,929** | **15.8%** | |
| **Grand Total** | | **352** | **65** | **$128,185** | **299** | **58** | **112,334** | **0.19** | **21** | **3** | **$6,929** | **14.3%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Taylor Smith

Role: LBE

LBE UPN:1320407

SELECT PREMIUM INS AGENCY DBA METRO CHOICE INS AGENCY

Address: 190 BLUEGRASS PARKWAY

ALPHARETTA GA 30005

Phone/Email: 4042608734 SCOTTSCHWAEMMLE@GMAIL.COM

GA

# Agency Scorecard

## 1360841, TODD HOFFMAN AGENCY LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $638 | 9999.9% | 18.8% | $638 | 9999.9% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Home | $6,708 | -1.0% | 15.3% | $6,708 | 3.6% | $0 | 0.0% | 3 | 0.0% | 100.0% | $2,236 | 10/31/2025 |
| | Marine | $5,310 | 729.7% | 23.1% | $5,310 | 729.7% | ($90) | 0.0% | 6 | 200.0% | 150.0% | $885 | 10/31/2025 |
| | Mobile Home | ($4,713) | -152.6% | -19.5% | $0 | -100.0% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $211 | -87.7% | 4.1% | $211 | -87.7% | $0 | -100.0% | 1 | -50.0% | 50.0% | $211 | 10/31/2025 |
| | Off-Road Veh | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $1,323 | 4.8% | 15.2% | $1,323 | 4.8% | $0 | -100.0% | 2 | 0.0% | 100.0% | $662 | 10/31/2025 |
| | **Total** | **$9,477** | **-51.0%** | **14.5%** | **$14,190** | **-4.2%** | **($90)** | **-111.0%** | **12** | **20.0%** | **92.3%** | **$790** | |
| **Total** | **Total** | **$9,477** | **-51.0%** | **14.5%** | **$14,190** | **-4.2%** | **($90)** | **-111.0%** | **12** | **20.0%** | **92.3%** | **$790** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 5 | 0 | $0 | 4 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **5** | **0** | **$0** | **4** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 7 | 1 | $5,292 | 7 | 1 | $5,292 | 0.14 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 3 | 2 | $1,555 | 3 | 2 | $1,555 | 0.67 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **11** | **3** | **$6,847** | **11** | **3** | **6,847** | **0.27** | **1** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **16** | **3** | **$6,847** | **15** | **3** | **6,847** | **0.20** | **1** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Ryan Kragt

Role: LBE

LBE UPN:1360841

TODD HOFFMAN AGENCY LLC

Address: 2100 WESTSHORE DR STE 210

CUMMING GA 30041

Phone/Email: 6783475166 TODD@TODDHOFFMANAGENCY.COM

GA

# Agency Scorecard

## 1363513, THOMAS AMRITT AGENCY LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $7,512 | 256.2% | 372.0% | $7,512 | 9999.9% | $0 | 0.0% | 3 | 200.0% | 60.0% | $2,504 | 10/31/2025 |
| | Mobile Home | $1,224 | 3.7% | 10.1% | $1,224 | 3.7% | $0 | -100.0% | 1 | 0.0% | 100.0% | $1,224 | 10/31/2025 |
| | Motor Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Travel Trailer | $472 | 0.9% | 13.2% | $472 | 0.9% | $0 | 0.0% | 1 | 0.0% | 100.0% | $472 | 10/31/2025 |
| | **Total** | **$9,208** | **145.1%** | **237.3%** | **$9,208** | **458.7%** | **$0** | **-100.0%** | **5** | **66.7%** | **71.4%** | **$1,842** | |
| **Total** | **Total** | **$9,208** | **145.1%** | **237.3%** | **$9,208** | **458.7%** | **$0** | **-100.0%** | **5** | **66.7%** | **71.4%** | **$1,842** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 14 | 4 | $9,705 | 14 | 4 | $9,705 | 0.29 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **16** | **4** | **$9,705** | **16** | **4** | **9,705** | **0.25** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **16** | **4** | **$9,705** | **16** | **4** | **9,705** | **0.25** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1363513

THOMAS AMRITT AGENCY LLC

Address: 126 ENTERPRISE PATH STE 101

HIRAM GA 30141

Phone/Email: 7709498500 TEAMRITT@GMAIL.COM

GA

# Agency Scorecard

## 1406529, THE AGENCY OF THE PEOPLE LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $47,419 | 66.9% | 47.9% | $33,751 | 36.3% | $3,821 | 88.0% | 18 | 20.0% | 56.3% | $2,634 | 10/31/2025 |
| | Home | $13,115 | -1.0% | 140.7% | $13,115 | 28.8% | $0 | 0.0% | 5 | -16.7% | 83.3% | $2,623 | 10/31/2025 |
| | Mobile Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Travel Trailer | $147 | 9999.9% | -58.9% | $147 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $147 | 10/31/2025 |
| | **Total** | **$60,681** | **45.7%** | **72.0%** | **$47,013** | **34.5%** | **$3,821** | **88.0%** | **24** | **14.3%** | **61.5%** | **$2,528** | |
| **Total** | **Total** | **$60,681** | **45.7%** | **72.0%** | **$47,013** | **34.5%** | **$3,821** | **88.0%** | **24** | **14.3%** | **61.5%** | **$2,528** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 53 | 17 | $40,875 | 44 | 16 | $38,116 | 0.36 | 8 | 2 | $3,821 | 25.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 1 | 1 | $247 | 1 | 1 | $247 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **56** | **18** | **$41,122** | **47** | **17** | **38,363** | **0.36** | **8** | **2** | **$3,821** | **25.0%** | |
| **Grand Total** | | **56** | **18** | **$41,122** | **47** | **17** | **38,363** | **0.36** | **8** | **2** | **$3,821** | **25.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1406529

THE AGENCY OF THE PEOPLE LLC

Address: 2255 CUMBERLAND PKWY SE

ATLANTA GA 30339

Phone/Email: 4044901815 ASKANINSURANCEGUY@GMAIL.COM

GA

# Agency Scorecard

## 1412187, SAFE HARBOR INSURANCE LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Home | $0 | -100.0% | 12.1% | $0 | -100.0% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Marine | $216 | 66.2% | 14.5% | $216 | 2.4% | $0 | 0.0% | 1 | 0.0% | 100.0% | $216 | 10/31/2025 |
| | **Total** | **$216** | **-88.4%** | **12.6%** | **$216** | **-88.9%** | **$0** | **0.0%** | **1** | **-50.0%** | **50.0%** | **$216** | |
| **Total** | **Total** | **$216** | **-88.4%** | **12.6%** | **$216** | **-88.9%** | **$0** | **0.0%** | **1** | **-50.0%** | **50.0%** | **$216** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 4 | 0 | $0 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **4** | **0** | **$0** | **3** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **4** | **0** | **$0** | **3** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1412187

SAFE HARBOR INSURANCE LLC

Address: 3950 COBB PKWY NW STE 503

ACWORTH GA 30101

Phone/Email: 7707672621 JIM@SAFEHARBORHQ.COM

GA

# Agency Scorecard

## 1431302, FOUR HORSEMEN AGENCY, LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $181 | -92.9% | -244.1% | $181 | -92.9% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Home | $3,429 | 25.4% | 15.5% | $3,429 | 25.4% | $0 | 0.0% | 1 | 0.0% | 100.0% | $3,429 | 10/31/2025 |
| | Mobile Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $1,509 | 9.0% | 15.0% | $1,509 | 9.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,509 | 10/31/2025 |
| | Travel Trailer | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$5,119** | **-19.0%** | **5.2%** | **$5,119** | **-19.0%** | **$0** | **0.0%** | **2** | **0.0%** | **66.7%** | **$2,560** | |
| **Total** | **Total** | **$5,119** | **-19.0%** | **5.2%** | **$5,119** | **-19.0%** | **$0** | **0.0%** | **2** | **0.0%** | **66.7%** | **$2,560** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 723 | 0 | $0 | 660 | 0 | $0 | 0.00 | 82 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **724** | **0** | **$0** | **661** | **0** | **0** | **0.00** | **82** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 21 | 1 | $4,711 | 19 | 1 | $4,711 | 0.05 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **22** | **1** | **$4,711** | **20** | **1** | **4,711** | **0.05** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **746** | **1** | **$4,711** | **681** | **1** | **4,711** | **0.00** | **82** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1431302

FOUR HORSEMEN AGENCY, LLC

Address: 4344 SOUTHSIDE DR STE A

ACWORTH GA 30101

Phone/Email: 7706273493 MARVON@THEFOURHORSEMENAGENCY.COM

# Agency Scorecard

**ID**

## 1405280, FIRST OPTION INS BROKERAGE,LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Home | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Marine | $194 | 9999.9% | 16.1% | $0 | 0.0% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $194 | 10/31/2025 |
| | Mobile Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motor Home | $1,076 | 9999.9% | 17.4% | $1,076 | 9999.9% | $0 | 0.0% | 2 | 9999.9% | 100.0% | $538 | 10/31/2025 |
| | Motorcycle | $348 | 123.1% | 5.7% | $178 | 14.1% | $0 | 0.0% | 2 | 100.0% | 100.0% | $174 | 10/31/2025 |
| | Rental M.H. | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Travel Trailer | $422 | -50.5% | -372.5% | $422 | -50.5% | $0 | 0.0% | 2 | -33.3% | 66.7% | $211 | 10/31/2025 |
| | **Total** | **$2,040** | **301.6%** | **-148.5%** | **$1,676** | **229.9%** | **$0** | **0.0%** | **7** | **75.0%** | **87.5%** | **$291** | |
| **Total** | **Total** | **$2,040** | **301.6%** | **-148.5%** | **$1,676** | **229.9%** | **$0** | **0.0%** | **7** | **75.0%** | **87.5%** | **$291** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **1** | **0** | **$0** | **1** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 4 | 0 | $0 | 4 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 1 | 1 | $194 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 1 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 3 | 2 | $1,076 | 3 | 2 | $1,076 | 0.67 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 1 | 1 | $170 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **11** | **4** | **$1,440** | **8** | **2** | **1,076** | **0.25** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **12** | **4** | **$1,440** | **9** | **2** | **1,076** | **0.22** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Mike Belnap

Role: LBE

LBE UPN:1405280

FIRST OPTION INS BROKERAGE,LLC

Address: 3597 E MONARCH SKY LN

MERIDIAN ID 83646

Phone/Email: 2083705200 KATIE@FIRSTOPTIONINS.COM

# Agency Scorecard

**IL**

## 154759, RMS INSURANCE SERVICES INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $9,781 | 9999.9% | 0.8% | $9,781 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $9,781 | 10/31/2025 |
| | **Total** | **$9,781** | **9999.9%** | **0.8%** | **$9,781** | **9999.9%** | **$0** | **0.0%** | **1** | **9999.9%** | **100.0%** | **$9,781** | |
| Foremost Choice | Dwelling Fire | $8,860 | 11.2% | 21.6% | $8,860 | 11.2% | $0 | 0.0% | 4 | 0.0% | 100.0% | $2,215 | 10/31/2025 |
| | Home | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $308 | -53.7% | 24.8% | $308 | -53.7% | $0 | 0.0% | 1 | 0.0% | 50.0% | $308 | 10/31/2025 |
| | Motorcycle | $678 | 0.0% | 2.5% | $678 | 0.0% | $0 | 0.0% | 2 | 0.0% | 100.0% | $339 | 10/31/2025 |
| | Off-Road Veh | $503 | -6.5% | 1.8% | $503 | -6.5% | $0 | 0.0% | 1 | 0.0% | 100.0% | $503 | 10/31/2025 |
| | Travel Trailer | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$10,349** | **6.6%** | **19.2%** | **$10,349** | **6.6%** | **$0** | **0.0%** | **8** | **0.0%** | **88.9%** | **$1,294** | |
| **Total** | **Total** | **$20,130** | **107.3%** | **11.8%** | **$20,130** | **107.3%** | **$0** | **0.0%** | **9** | **12.5%** | **90.0%** | **$2,237** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 5 | 1 | $9,021 | 5 | 1 | $9,021 | 0.20 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **5** | **1** | **$9,021** | **5** | **1** | **9,021** | **0.20** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 10 | 0 | $0 | 8 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 6 | 1 | $454 | 6 | 1 | $454 | 0.17 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **19** | **1** | **$454** | **17** | **1** | **454** | **0.06** | **2** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **24** | **2** | **$9,475** | **22** | **2** | **9,475** | **0.09** | **2** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:154759

RMS INSURANCE SERVICES INC

Address: 1947 N LYFORD RD

ROCKFORD IL 61107

Phone/Email: 8152261444 OWEN@FLANDERSINSURANCE.COM

# Agency Scorecard

**IL**

## 1309599, BLUE INSURANCE GROUP LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $2,587 | 9999.9% | -3.1% | $2,587 | 9999.9% | $48 | 9999.9% | 1 | 9999.9% | 100.0% | $2,587 | 10/31/2025 |
| | **Total** | **$2,587** | **9999.9%** | **-3.1%** | **$2,587** | **9999.9%** | **$48** | **9999.9%** | **1** | **9999.9%** | **100.0%** | **$2,587** | |
| Foremost Choice | Dwelling Fire | $1,065 | 9999.9% | 26.2% | $1,065 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $1,065 | 10/31/2025 |
| | Home | $12,641 | 474.1% | 23.8% | $12,641 | 474.1% | $3,132 | 9999.9% | 5 | 400.0% | 83.3% | $2,528 | 10/31/2025 |
| | **Total** | **$13,706** | **522.4%** | **24.0%** | **$13,706** | **522.4%** | **$3,132** | **9999.9%** | **6** | **500.0%** | **85.7%** | **$2,284** | |
| **Total** | **Total** | **$16,293** | **639.9%** | **15.6%** | **$16,293** | **639.9%** | **$3,180** | **9999.9%** | **7** | **600.0%** | **87.5%** | **$2,328** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 66 | 1 | $2,539 | 44 | 1 | $2,539 | 0.02 | 5 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **66** | **1** | **$2,539** | **44** | **1** | **2,539** | **0.02** | **5** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 46 | 1 | $1,065 | 41 | 1 | $1,065 | 0.02 | 7 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 19 | 5 | $12,641 | 15 | 5 | $12,641 | 0.33 | 2 | 1 | $3,132 | 50.0% | 10/31/2025 |
| | **Total** | **65** | **6** | **$13,706** | **56** | **6** | **13,706** | **0.11** | **9** | **1** | **$3,132** | **11.1%** | |
| **Grand Total** | | **131** | **7** | **$16,245** | **100** | **7** | **16,245** | **0.07** | **14** | **1** | **$3,132** | **7.1%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Dee Hoffman

Role: LBE

LBE UPN:1309599

BLUE INSURANCE GROUP LLC

Address: 29W130 BUTTERFIELD RD STE 104A

WARRENVILLE IL 60555

Phone/Email: 6309537440 FSANZERI@BLUE-IG.COM

# Agency Scorecard

**IL**

## 1343411, MICHAEL LOGUE & ASSOCIATES INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $3,636 | -13.4% | 19.7% | $3,636 | -13.4% | $1,988 | 3.7% | 2 | 0.0% | 66.7% | $1,818 | 10/31/2025 |
| | Home | $402 | -76.0% | 17.8% | ($1,476) | 0.0% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $3,575 | 6.6% | 18.5% | $2,010 | 5.6% | $0 | 0.0% | 3 | 0.0% | 100.0% | $1,192 | 10/31/2025 |
| | Travel Trailer | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$7,613** | **-17.5%** | **19.0%** | **$4,170** | **-31.7%** | **$1,988** | **3.7%** | **5** | **-16.7%** | **71.4%** | **$1,523** | |
| **Total** | **Total** | **$7,613** | **-17.5%** | **19.0%** | **$4,170** | **-31.7%** | **$1,988** | **3.7%** | **5** | **-16.7%** | **71.4%** | **$1,523** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **1** | **0** | **$0** | **1** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 7 | 1 | $1,648 | 6 | 1 | $1,648 | 0.17 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **8** | **1** | **$1,648** | **7** | **1** | **1,648** | **0.14** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **9** | **1** | **$1,648** | **8** | **1** | **1,648** | **0.13** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1343411

MICHAEL LOGUE & ASSOCIATES INC

Address: 7187 PRESIDENTIAL DR

GURNEE IL 60031

Phone/Email: 8476623600 HUGHMLOGUE@OUTLOOK.COM

# Agency Scorecard

**IL**

## 1355037, HUNZIKER-NAGEL INSURANCE SOLUTIONS INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $4,994 | 9999.9% | 0.8% | $4,994 | 9999.9% | $2,971 | 9999.9% | 2 | 9999.9% | 100.0% | $2,497 | 10/31/2025 |
| | **Total** | **$4,994** | **9999.9%** | **0.8%** | **$4,994** | **9999.9%** | **$2,971** | **9999.9%** | **2** | **9999.9%** | **100.0%** | **$2,497** | |
| Foremost Choice | Dwelling Fire | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Home | $4,552 | 66.6% | 23.3% | $4,552 | 66.6% | $0 | 0.0% | 1 | 0.0% | 50.0% | $4,552 | 10/31/2025 |
| | Mobile Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$4,552** | **66.6%** | **23.3%** | **$4,552** | **66.6%** | **$0** | **0.0%** | **1** | **0.0%** | **50.0%** | **$4,552** | |
| **Total** | **Total** | **$9,546** | **249.4%** | **18.5%** | **$9,546** | **249.4%** | **$2,971** | **9999.9%** | **3** | **200.0%** | **75.0%** | **$3,182** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 3 | 2 | $4,994 | 2 | 2 | $4,994 | 1.00 | 0 | 1 | $2,971 | 0.0% | 10/31/2025 |
| | **Total** | **3** | **2** | **$4,994** | **2** | **2** | **4,994** | **1.00** | **0** | **1** | **$2,971** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 3 | 0 | $0 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 3 | 1 | $2,419 | 3 | 1 | $2,419 | 0.33 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **6** | **1** | **$2,419** | **6** | **1** | **2,419** | **0.17** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **9** | **3** | **$7,413** | **8** | **3** | **7,413** | **0.38** | **0** | **1** | **$2,971** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1355037

HUNZIKER-NAGEL INSURANCE SOLUTIONS INC

Address: 220 CHANNAHON ST

SHOREWOOD IL 60404

Phone/Email: 8152552322 HEATHER@HNINSURANCESOLUTIONS.COM

# Agency Scorecard

**IL**

## 1381671, INTERFIRST INSURANCE GROUP LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $24,028 | 9.2% | 4.3% | $24,793 | 12.7% | ($3,301) | -201.7% | 4 | -55.6% | 28.6% | $6,007 | 10/31/2025 |
| | **Total** | **$24,028** | **9.2%** | **4.3%** | **$24,793** | **12.7%** | **($3,301)** | **-201.7%** | **4** | **-55.6%** | **28.6%** | **$6,007** | |
| Foremost Choice | Dwelling Fire | $2,431 | 9999.9% | 26.3% | $2,431 | 9999.9% | $510 | 9999.9% | 1 | 9999.9% | 33.3% | $2,431 | 10/31/2025 |
| | Home | $5,151 | 9999.9% | 26.3% | $5,151 | 9999.9% | $0 | 0.0% | 3 | 9999.9% | 100.0% | $1,717 | 10/31/2025 |
| | Mobile Home | $1,878 | 137.4% | 26.6% | $1,878 | 137.4% | $0 | -100.0% | 2 | 9999.9% | 200.0% | $939 | 10/31/2025 |
| | **Total** | **$9,460** | **1096.0%** | **26.4%** | **$9,460** | **1096.0%** | **$510** | **-35.5%** | **6** | **9999.9%** | **85.7%** | **$1,577** | |
| **Total** | **Total** | **$33,488** | **46.9%** | **6.7%** | **$34,253** | **50.3%** | **($2,791)** | **-169.1%** | **10** | **11.1%** | **47.6%** | **$3,349** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 91 | 5 | $14,997 | 66 | 5 | $14,997 | 0.08 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **91** | **5** | **$14,997** | **66** | **5** | **14,997** | **0.08** | **2** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 17 | 3 | $3,835 | 16 | 3 | $3,835 | 0.19 | 3 | 1 | $1,321 | 33.3% | 10/31/2025 |
| | Home | 18 | 3 | $5,101 | 18 | 3 | $5,101 | 0.17 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 5 | 1 | $1,078 | 5 | 1 | $1,078 | 0.20 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **40** | **7** | **$10,014** | **39** | **7** | **10,014** | **0.18** | **4** | **1** | **$1,321** | **25.0%** | |
| **Grand Total** | | **131** | **12** | **$25,011** | **105** | **12** | **25,011** | **0.11** | **6** | **1** | **$1,321** | **16.7%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Amanda Tam

Role: LBE

LBE UPN:1381671

INTERFIRST INSURANCE GROUP LLC

Address: 945 LAKEVIEW PKWY UNIT 174

VERNON HILLS IL 60061

Phone/Email: 8472607686 VZAREMBA@INTERFIRSTINSURANCE.COM

# Agency Scorecard

**IL**

**1445989, WEIER,DAN M**

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $911 | 9999.9% | -142.8% | $911 | 9999.9% | ($62) | 0.0% | 1 | 9999.9% | 100.0% | $911 | 10/31/2025 |
| | **Total** | **$911** | **9999.9%** | **-142.8%** | **$911** | **9999.9%** | **($62)** | **0.0%** | **1** | **9999.9%** | **100.0%** | **$911** | |
| Foremost Choice | Dwelling Fire | $20,664 | 219.5% | 22.0% | $16,908 | 306.1% | $10,216 | -1106.5% | 13 | 225.0% | 86.7% | $1,590 | 10/31/2025 |
| | Home | $0 | -100.0% | 16.0% | $0 | -100.0% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $3,527 | 18.1% | 212.0% | $807 | 3.9% | $0 | 0.0% | 2 | 0.0% | 100.0% | $1,764 | 10/31/2025 |
| | Travel Trailer | $363 | -2.9% | 16.6% | $363 | -2.9% | $0 | 0.0% | 1 | 0.0% | 100.0% | $363 | 10/31/2025 |
| | **Total** | **$24,554** | **138.2%** | **75.6%** | **$18,078** | **212.1%** | **$10,216** | **-1106.5%** | **16** | **100.0%** | **84.2%** | **$1,535** | |
| **Total** | **Total** | **$25,465** | **147.1%** | **70.8%** | **$18,989** | **227.8%** | **$10,154** | **-1100.4%** | **17** | **112.5%** | **85.0%** | **$1,498** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 9 | 1 | $883 | 9 | 1 | $883 | 0.11 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **9** | **1** | **$883** | **9** | **1** | **883** | **0.11** | **2** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 27 | 11 | $14,994 | 24 | 10 | $13,747 | 0.42 | 4 | 8 | $10,926 | 200.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 3 | 0 | $0 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **30** | **11** | **$14,994** | **27** | **10** | **13,747** | **0.37** | **4** | **8** | **$10,926** | **200.0%** | |
| **Grand Total** | | **39** | **12** | **$15,877** | **36** | **11** | **14,630** | **0.31** | **6** | **8** | **$10,926** | **133.3%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner

Portfolio Owner: Amanda Tam

Role: LBE

LBE UPN:1445989

WEIER,DAN M

Address: 203 E GRAND AVE STE 102

LAKE VILLA IL 60046

Phone/Email: 8473566400 DWEIER@DMWAGENCY.COM

# Agency Scorecard

**IN**

## 748931, KLC INSURANCE INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $8,657 | -30.6% | 1.9% | $6,910 | -31.3% | $48 | -84.1% | 2 | -50.0% | 33.3% | $4,329 | 10/31/2025 |
| | **Total** | **$8,657** | **-30.6%** | **1.9%** | **$6,910** | **-31.3%** | **$48** | **-84.1%** | **2** | **-50.0%** | **33.3%** | **$4,329** | |
| Foremost Choice | Dwelling Fire | $20,419 | 50.6% | 55.9% | $19,649 | 53.6% | $318 | -115.7% | 12 | 33.3% | 92.3% | $1,702 | 10/31/2025 |
| | Home | $19,390 | 54.7% | 12.9% | $16,921 | 131.7% | $8,260 | 33.1% | 9 | 80.0% | 90.0% | $2,154 | 10/31/2025 |
| | Mobile Home | $1,569 | -42.6% | 11.1% | $1,569 | -42.6% | $0 | 0.0% | 1 | -66.7% | 25.0% | $1,569 | 10/31/2025 |
| | Motor Home | $1,214 | 9999.9% | 17.4% | $1,214 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $1,214 | 10/31/2025 |
| | Motorcycle | $0 | -100.0% | -28.4% | $0 | -100.0% | $0 | -100.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Off-Road Veh | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $3,683 | 8.5% | 13.6% | $3,683 | 32.2% | $0 | 0.0% | 2 | 0.0% | 100.0% | $1,842 | 10/31/2025 |
| | Travel Trailer | $510 | 9999.9% | 21.9% | $510 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $510 | 10/31/2025 |
| | **Total** | **$46,785** | **44.1%** | **31.7%** | **$43,546** | **68.4%** | **$8,578** | **147.1%** | **26** | **30.0%** | **78.8%** | **$1,799** | |
| **Total** | **Total** | **$55,442** | **23.4%** | **25.3%** | **$50,456** | **40.5%** | **$8,626** | **128.6%** | **28** | **16.7%** | **71.8%** | **$1,980** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 19 | 2 | $3,608 | 19 | 2 | $3,608 | 0.11 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **19** | **2** | **$3,608** | **19** | **2** | **3,608** | **0.11** | **2** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 49 | 4 | $9,018 | 47 | 4 | $9,018 | 0.09 | 9 | 1 | $3,190 | 11.1% | 10/31/2025 |
| | Home | 48 | 5 | $9,855 | 47 | 5 | $9,855 | 0.11 | 5 | 1 | $1,874 | 20.0% | 10/31/2025 |
| | Mobile Home | 9 | 1 | $1,501 | 7 | 1 | $1,501 | 0.14 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 1 | 1 | $1,214 | 1 | 1 | $1,214 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 7 | 1 | $1,001 | 6 | 1 | $1,001 | 0.17 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 2 | 1 | $510 | 2 | 1 | $510 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **117** | **13** | **$23,099** | **111** | **13** | **23,099** | **0.12** | **14** | **2** | **$5,064** | **14.3%** | |
| **Grand Total** | | **136** | **15** | **$26,707** | **130** | **15** | **26,707** | **0.12** | **16** | **2** | **$5,064** | **12.5%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:748931

KLC INSURANCE INC

Address: 8001 S MERIDIAN ST

INDIANAPOLIS IN 46217

Phone/Email: 3178848046 KIM_CHERRY@COMCAST.NET

# Agency Scorecard

**IN**

## 1154980, CHAMPION INS SERVICES LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $19 | 9999.9% | 1.9% | $19 | 9999.9% | $19 | 9999.9% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$19** | **9999.9%** | **1.9%** | **$19** | **9999.9%** | **$19** | **9999.9%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $21,653 | 289.5% | 13.1% | $19,033 | 295.0% | $3,130 | 9999.9% | 19 | 216.7% | 95.0% | $1,140 | 10/31/2025 |
| | Home | $15,336 | 406.8% | 14.8% | $12,808 | 9999.9% | $0 | 0.0% | 12 | 500.0% | 100.0% | $1,278 | 10/31/2025 |
| | Mobile Home | $3,239 | 13.1% | 13.2% | $1,832 | 20.2% | $0 | 0.0% | 3 | 0.0% | 100.0% | $1,080 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Off-Road Veh | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $2,147 | 725.8% | 17.7% | $1,219 | 368.8% | $0 | 0.0% | 2 | 100.0% | 66.7% | $1,074 | 10/31/2025 |
| | Travel Trailer | $2,907 | 9999.9% | 22.0% | $1,454 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $2,907 | 10/31/2025 |
| | **Total** | **$45,282** | **286.7%** | **14.4%** | **$36,346** | **450.4%** | **$3,130** | **9999.9%** | **37** | **208.3%** | **94.9%** | **$1,224** | |
| **Total** | **Total** | **$45,301** | **286.9%** | **14.4%** | **$36,365** | **450.7%** | **$3,149** | **9999.9%** | **37** | **208.3%** | **92.5%** | **$1,224** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 2 | 1 | $664 | 2 | 1 | $664 | 0.50 | 1 | 1 | $664 | 100.0% | 10/31/2025 |
| | **Total** | **2** | **1** | **$664** | **2** | **1** | **664** | **0.50** | **1** | **1** | **$664** | **100.0%** | |
| Foremost Choice | Dwelling Fire | 65 | 14 | $14,688 | 59 | 14 | $14,688 | 0.24 | 7 | 2 | $2,321 | 28.6% | 10/31/2025 |
| | Home | 49 | 10 | $11,629 | 49 | 10 | $11,629 | 0.20 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 17 | 0 | $0 | 17 | 0 | $0 | 0.00 | 4 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 3 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 3 | 2 | $2,574 | 1 | 1 | $1,646 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 3 | 1 | $1,453 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **142** | **27** | **$30,344** | **132** | **25** | **27,963** | **0.19** | **13** | **2** | **$2,321** | **15.4%** | |
| **Grand Total** | | **144** | **28** | **$31,008** | **134** | **26** | **28,627** | **0.19** | **14** | **3** | **$2,985** | **21.4%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Jami Young

Role: LBE

LBE UPN:1154980

CHAMPION INS SERVICES LLC

Address: 115 E MAIN ST

PORTLAND IN 47371

Phone/Email: 2607269345 KYLE@PORTINS.COM

# Agency Scorecard

**IN**

## 1430940, SCOTT SCALES INSURANCE AGENCY, INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $100 | -92.3% | 14.2% | $100 | -92.3% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Home | $5,175 | 159.3% | 24.1% | $5,175 | 159.3% | $1,864 | 9999.9% | 3 | 200.0% | 100.0% | $1,725 | 10/31/2025 |
| | Mobile Home | $18,809 | 67.0% | 16.7% | $16,157 | 72.1% | $4,812 | 37.8% | 13 | 116.7% | 100.0% | $1,447 | 10/31/2025 |
| | Rental M.H. | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$24,084** | **65.4%** | **17.6%** | **$21,432** | **69.0%** | **$6,676** | **91.1%** | **16** | **100.0%** | **94.1%** | **$1,505** | |
| **Total** | **Total** | **$24,084** | **65.4%** | **17.6%** | **$21,432** | **69.0%** | **$6,676** | **91.1%** | **16** | **100.0%** | **94.1%** | **$1,505** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 1,022 | 0 | $0 | 891 | 0 | $0 | 0.00 | 75 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **1,022** | **0** | **$0** | **891** | **0** | **0** | **0.00** | **75** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 14 | 0 | $0 | 11 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 11 | 2 | $3,122 | 10 | 2 | $3,122 | 0.20 | 1 | 1 | $1,864 | 100.0% | 10/31/2025 |
| | Mobile Home | 20 | 7 | $6,656 | 18 | 6 | $5,972 | 0.33 | 1 | 1 | $563 | 100.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **45** | **9** | **$9,778** | **39** | **8** | **9,094** | **0.21** | **2** | **2** | **$2,427** | **100.0%** | |
| **Grand Total** | | **1,067** | **9** | **$9,778** | **930** | **8** | **9,094** | **0.01** | **77** | **2** | **$2,427** | **2.6%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Jami Young

Role: LBE

LBE UPN:1430940

SCOTT SCALES INSURANCE AGENCY, INC

Address: 53 LORI LEE DR STE 220

LAFAYETTE IN 47905

Phone/Email: 7657010121 SSCALES@SSINSURED.COM

**IN**

# Agency Scorecard

## 1433152, KODY NIESE AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $4,445 | 44.0% | 1.3% | $1,491 | -51.7% | $0 | 0.0% | 1 | 0.0% | 50.0% | $4,445 | 10/31/2025 |
| | **Total** | **$4,445** | **44.0%** | **1.3%** | **$1,491** | **-51.7%** | **$0** | **0.0%** | **1** | **0.0%** | **50.0%** | **$4,445** | |
| Foremost Choice | Dwelling Fire | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Home | $6,069 | -1297.0% | 40.7% | $3,143 | -719.9% | $3,143 | 9999.9% | 1 | 9999.9% | 100.0% | $6,069 | 10/31/2025 |
| | Mobile Home | $1,436 | 9999.9% | 19.2% | $1,436 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $1,436 | 10/31/2025 |
| | Motorcycle | ($398) | -124.8% | 2.1% | ($398) | -124.8% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Off-Road Veh | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Travel Trailer | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$7,107** | **552.0%** | **29.4%** | **$4,181** | **283.6%** | **$3,143** | **9999.9%** | **2** | **100.0%** | **66.7%** | **$3,554** | |
| **Total** | **Total** | **$11,552** | **176.6%** | **14.5%** | **$5,672** | **35.8%** | **$3,143** | **9999.9%** | **3** | **50.0%** | **60.0%** | **$3,851** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 9 | 1 | $1,057 | 7 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **9** | **1** | **$1,057** | **7** | **0** | **0** | **0.00** | **1** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 7 | 0 | $0 | 5 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 1 | 1 | $2,926 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 1 | 1 | $1,436 | 1 | 1 | $1,436 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 1 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **11** | **2** | **$4,362** | **8** | **1** | **1,436** | **0.13** | **1** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **20** | **3** | **$5,419** | **15** | **1** | **1,436** | **0.07** | **2** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1433152

KODY NIESE AGENCY INC

Address: 420 W 2ND ST

BLOOMINGTON IN 47403

Phone/Email: 8122212000 KODY@KODYNIESE.COM

**IN**

# Agency Scorecard

## 1445153, THE SWENEY AGENCY LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $9,935 | 643.1% | 16.0% | $9,935 | 643.1% | $0 | 0.0% | 8 | 700.0% | 100.0% | $1,242 | 10/31/2025 |
| | Home | $80,671 | 339.5% | 17.5% | $81,576 | 705.0% | $8,546 | 204.8% | 54 | 500.0% | 84.4% | $1,494 | 10/31/2025 |
| | Mobile Home | $3,003 | 9999.9% | 19.3% | $3,003 | 9999.9% | $0 | 0.0% | 2 | 9999.9% | 66.7% | $1,502 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Off-Road Veh | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Travel Trailer | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$93,609** | **375.4%** | **17.3%** | **$94,514** | **723.9%** | **$8,546** | **204.8%** | **64** | **540.0%** | **85.3%** | **$1,463** | |
| **Total** | **Total** | **$93,609** | **375.4%** | **17.3%** | **$94,514** | **723.9%** | **$8,546** | **204.8%** | **64** | **540.0%** | **85.3%** | **$1,463** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 51 | 7 | $8,749 | 49 | 7 | $8,749 | 0.14 | 4 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 159 | 55 | $83,157 | 153 | 55 | $83,157 | 0.36 | 25 | 6 | $8,918 | 24.0% | 10/31/2025 |
| | Mobile Home | 11 | 3 | $4,511 | 10 | 3 | $4,511 | 0.30 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 4 | 0 | $0 | 4 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **227** | **65** | **$96,417** | **218** | **65** | **96,417** | **0.30** | **30** | **6** | **$8,918** | **20.0%** | |
| **Grand Total** | | **227** | **65** | **$96,417** | **218** | **65** | **96,417** | **0.30** | **30** | **6** | **$8,918** | **20.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Jami Young

Role: LBE

LBE UPN:1445153

THE SWENEY AGENCY LLC

Address: 6001 N US 31 STE 12

WHITELAND IN 46184

Phone/Email: 3175346800 INFO@CORNERSTONEINSURANCEBROKERS.COM

KS

# Agency Scorecard

## 1280909, MILLER & ASSOCIATES INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $21,286 | -54.5% | 211.9% | $17,211 | -61.0% | ($406) | -17.3% | 8 | -33.3% | 25.0% | $2,661 | 10/31/2025 |
| | **Total** | **$21,286** | **-54.5%** | **211.9%** | **$17,211** | **-61.0%** | **($406)** | **-17.3%** | **8** | **-33.3%** | **25.0%** | **$2,661** | |
| Foremost Choice | Dwelling Fire | $35,668 | 59.1% | 20.1% | $35,668 | 65.7% | $753 | 84.6% | 7 | 133.3% | 100.0% | $5,095 | 10/31/2025 |
| | Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$35,668** | **59.1%** | **20.1%** | **$35,668** | **65.7%** | **$753** | **84.6%** | **7** | **133.3%** | **100.0%** | **$5,095** | |
| **Total** | **Total** | **$56,954** | **-17.7%** | **116.3%** | **$52,879** | **-19.5%** | **$347** | **-518.1%** | **15** | **0.0%** | **38.5%** | **$3,797** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 843 | 20 | $25,881 | 834 | 20 | $25,881 | 0.02 | 142 | 2 | $2,104 | 1.4% | 10/31/2025 |
| | **Total** | **843** | **20** | **$25,881** | **834** | **20** | **25,881** | **0.02** | **142** | **2** | **$2,104** | **1.4%** | |
| Foremost Choice | Dwelling Fire | 30 | 4 | $13,560 | 27 | 4 | $13,560 | 0.15 | 6 | 1 | $753 | 16.7% | 10/31/2025 |
| | Home | 1 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **31** | **4** | **$13,560** | **27** | **4** | **13,560** | **0.15** | **6** | **1** | **$753** | **16.7%** | |
| **Grand Total** | | **874** | **24** | **$39,441** | **861** | **24** | **39,441** | **0.03** | **148** | **3** | **$2,857** | **2.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Grant Andreasen

Role: LBE

LBE UPN:1280909

MILLER & ASSOCIATES INC

Address: 107 S MUR LEN RD

OLATHE KS 66062

Phone/Email: 9134699400 KEVIN@MILLERINSURANCESTORE.COM

KS

# Agency Scorecard

## 1422887, MG AGENCY LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $50,224 | 1443.9% | 24.5% | $50,224 | 2763.4% | $1,212 | -61.6% | 24 | 1100.0% | 80.0% | $2,093 | 10/31/2025 |
| | Home | $0 | -100.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$50,224** | **5030.1%** | **24.4%** | **$50,224** | **2763.4%** | **$1,212** | **-61.6%** | **24** | **1100.0%** | **80.0%** | **$2,093** | |
| **Total** | **Total** | **$50,224** | **5030.1%** | **24.4%** | **$50,224** | **2763.4%** | **$1,212** | **-61.6%** | **24** | **1100.0%** | **80.0%** | **$2,093** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 3 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **3** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 99 | 28 | $62,023 | 91 | 28 | $62,023 | 0.31 | 2 | 1 | $1,212 | 50.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **101** | **28** | **$62,023** | **93** | **28** | **62,023** | **0.30** | **2** | **1** | **$1,212** | **50.0%** | |
| **Grand Total** | | **104** | **28** | **$62,023** | **93** | **28** | **62,023** | **0.30** | **2** | **1** | **$1,212** | **50.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Grant Andreasen

Role: LBE

LBE UPN:1422887

MG AGENCY LLC

Address: 1510 N 2ND AVE

DODGE CITY KS 67801

Phone/Email: 6206826244 INFO@MGAGENCYLLC.COM

KY

# Agency Scorecard

## 1119424, CAST IRON INSURANCE

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $572 | -94.9% | 16.7% | $1,708 | -84.6% | $0 | 0.0% | 2 | -77.8% | 22.2% | $286 | 10/31/2025 |
| | Marine | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Travel Trailer | $78 | -87.0% | 8033.4% | ($492) | 0.0% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$650** | **-94.5%** | **441.6%** | **$1,216** | **-89.2%** | **$0** | **0.0%** | **2** | **-80.0%** | **20.0%** | **$325** | |
| **Total** | **Total** | **$650** | **-94.5%** | **441.6%** | **$1,216** | **-89.2%** | **$0** | **0.0%** | **2** | **-80.0%** | **20.0%** | **$325** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **2** | **0** | **$0** | **2** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **2** | **0** | **$0** | **2** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1119424

CAST IRON INSURANCE

Address: 501 MAIN ST

PARIS KY 40361

Phone/Email: 8594882050 SUPPORT@CASTIRONINSURANCE.COM

KY

# Agency Scorecard

## 1289158, AMERICA'S TRUSTED INSURANCE GROUP LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $23,626 | 34.5% | 187.9% | $21,787 | 26.3% | $1,243 | -48.3% | 15 | -11.8% | 88.2% | $1,575 | 10/31/2025 |
| | Motorcycle | $180 | 0.0% | 2.3% | $180 | 0.0% | $90 | 0.0% | 2 | 0.0% | 100.0% | $90 | 10/31/2025 |
| | Rental M.H. | $558 | 9.8% | 17.5% | $558 | 9.8% | $0 | 0.0% | 1 | 0.0% | 100.0% | $558 | 10/31/2025 |
| | **Total** | **$24,364** | **34.6%** | **181.8%** | **$22,525** | **33.3%** | **$1,333** | **-46.5%** | **18** | **-10.0%** | **90.0%** | **$1,354** | |
| **Total** | **Total** | **$24,364** | **34.6%** | **181.8%** | **$22,525** | **33.3%** | **$1,333** | **-46.5%** | **18** | **-10.0%** | **90.0%** | **$1,354** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 4 | 0 | $0 | 4 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **8** | **0** | **$0** | **8** | **0** | **0** | **0.00** | **2** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **8** | **0** | **$0** | **8** | **0** | **0** | **0.00** | **2** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: SUB

LBE UPN:1289152

1289152

AMERICA'S TRUSTED INSURANCE GROUP LLC

Address: 4130 ALEXANDRIA PIKE

COLD SPRING KY 41076

Phone/Email: 8594420123 SERVICE@MYATIG.COM

**MD**

# Agency Scorecard

## 1277664, THE WRIGHT AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | ($495) | -130.8% | 2.1% | $0 | -100.0% | $0 | -100.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **($495)** | **-130.8%** | **2.1%** | **$0** | **-100.0%** | **$0** | **-100.0%** | **0** | **-100.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $166,860 | 6.8% | 25.7% | $142,740 | 0.2% | $14,543 | 14.4% | 88 | -8.3% | 83.0% | $1,896 | 10/31/2025 |
| | Home | $4,868 | 3.2% | 9.3% | $4,868 | 3.2% | $3,072 | 2.9% | 2 | 0.0% | 100.0% | $2,434 | 10/31/2025 |
| | Mobile Home | $832 | 9999.9% | 18.4% | $832 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $832 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$172,560** | **7.2%** | **25.3%** | **$148,440** | **0.8%** | **$17,615** | **12.2%** | **91** | **-7.1%** | **83.5%** | **$1,896** | |
| **Total** | **Total** | **$172,065** | **5.9%** | **25.3%** | **$148,440** | **-0.3%** | **$17,615** | **8.9%** | **91** | **-8.1%** | **82.7%** | **$1,891** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 683 | 0 | $0 | 502 | 0 | $0 | 0.00 | 62 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **683** | **0** | **$0** | **502** | **0** | **0** | **0.00** | **62** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 330 | 10 | $27,825 | 278 | 9 | $25,710 | 0.03 | 39 | 2 | $7,579 | 5.1% | 10/31/2025 |
| | Home | 48 | 0 | $0 | 40 | 0 | $0 | 0.00 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 1 | 1 | $832 | 1 | 1 | $832 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 1 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **380** | **11** | **$28,657** | **319** | **10** | **26,542** | **0.03** | **41** | **2** | **$7,579** | **4.9%** | |
| **Grand Total** | | **1,063** | **11** | **$28,657** | **821** | **10** | **26,542** | **0.01** | **103** | **2** | **$7,579** | **1.9%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Jake Nelson

Role: LBE

LBE UPN:1277664

THE WRIGHT AGENCY INC

Address: 2525 HANOVER PIKE

HAMPSTEAD MD 21074

Phone/Email: 4107470700 JULIAN@THEWRIGHTAGENCY4U.COM

**MD**

# Agency Scorecard

## 1278327, JONES INSURANCE AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $4,686 | 2.5% | 46.4% | $3,327 | 1.4% | $0 | 0.0% | 2 | 0.0% | 100.0% | $2,343 | 10/31/2025 |
| | **Total** | **$4,686** | **2.5%** | **46.4%** | **$3,327** | **1.4%** | **$0** | **0.0%** | **2** | **0.0%** | **100.0%** | **$2,343** | |
| Foremost Choice | Dwelling Fire | $19,739 | 17.7% | 9.1% | $18,253 | 8.8% | $0 | -100.0% | 7 | 16.7% | 70.0% | $2,820 | 10/31/2025 |
| | Home | $1,047 | 10.3% | 11.0% | $1,047 | 10.3% | $1,047 | 10.3% | 1 | 0.0% | 100.0% | $1,047 | 10/31/2025 |
| | Marine | $305 | 0.0% | 27.1% | $305 | 0.0% | $0 | -100.0% | 1 | 0.0% | 100.0% | $305 | 10/31/2025 |
| | Mobile Home | $25,729 | 6.8% | 19.0% | $20,542 | 3.4% | $942 | 9999.9% | 22 | -8.3% | 84.6% | $1,170 | 10/31/2025 |
| | Motor Home | $1,474 | 0.3% | 12.8% | $1,474 | 0.3% | $0 | 0.0% | 2 | 0.0% | 100.0% | $737 | 10/31/2025 |
| | Motorcycle | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Off-Road Veh | $225 | 0.0% | 4.1% | $150 | 0.0% | $0 | 0.0% | 3 | 0.0% | 75.0% | $75 | 10/31/2025 |
| | Rental M.H. | $1,452 | 9999.9% | 22.8% | $1,452 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $1,452 | 10/31/2025 |
| | Travel Trailer | $188 | 66.4% | 17.0% | $188 | 66.4% | ($405) | 0.0% | 1 | 0.0% | 50.0% | $188 | 10/31/2025 |
| | **Total** | **$50,159** | **13.8%** | **14.7%** | **$43,411** | **9.1%** | **$1,584** | **654.3%** | **38** | **0.0%** | **80.9%** | **$1,320** | |
| **Total** | **Total** | **$54,845** | **12.7%** | **17.6%** | **$46,738** | **8.5%** | **$1,584** | **654.3%** | **40** | **0.0%** | **81.6%** | **$1,371** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 183 | 0 | $0 | 163 | 0 | $0 | 0.00 | 25 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **183** | **0** | **$0** | **163** | **0** | **0** | **0.00** | **25** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 12 | 4 | $8,608 | 11 | 3 | $7,122 | 0.27 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 7 | 2 | $2,377 | 6 | 2 | $2,377 | 0.33 | 2 | 1 | $942 | 50.0% | 10/31/2025 |
| | Motor Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 1 | 1 | $75 | 1 | 1 | $75 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 1 | $1,452 | 1 | 1 | $1,452 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 2 | 1 | $480 | 2 | 1 | $480 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **23** | **9** | **$12,992** | **21** | **8** | **11,506** | **0.38** | **2** | **1** | **$942** | **50.0%** | |
| **Grand Total** | | **206** | **9** | **$12,992** | **184** | **8** | **11,506** | **0.04** | **27** | **1** | **$942** | **3.7%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Ben Flatau

Role: LBE

LBE UPN:1278327

JONES INSURANCE AGENCY INC

Address: 272 MACKALL ST

ELKTON MD 21921

Phone/Email: 4103984464 JONESINSURANCEAGENCYINC@HOTMAIL.COM

**MD**

# Agency Scorecard

## 1278360, CHARLES E DEALE & ASSOCIATES INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $10,926 | -6.2% | 21.8% | $12,876 | 2.1% | $0 | 0.0% | 5 | -16.7% | 83.3% | $2,185 | 10/31/2025 |
| | Mobile Home | $1,778 | 1.5% | 16.6% | $1,778 | 1.5% | $0 | -100.0% | 2 | 0.0% | 100.0% | $889 | 10/31/2025 |
| | Off-Road Veh | $75 | 0.0% | 4.4% | $75 | 0.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $75 | 10/31/2025 |
| | **Total** | **$12,779** | **-5.1%** | **21.1%** | **$14,729** | **2.0%** | **$0** | **-100.0%** | **8** | **-11.1%** | **88.9%** | **$1,597** | |
| **Total** | **Total** | **$12,779** | **-5.1%** | **21.1%** | **$14,729** | **2.0%** | **$0** | **-100.0%** | **8** | **-11.1%** | **88.9%** | **$1,597** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 3 | 0 | $0 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **4** | **0** | **$0** | **4** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **4** | **0** | **$0** | **4** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1278360

CHARLES E DEALE & ASSOCIATES INC

Address: 1910 TOWNE CENTRE BLVD STE 250

ANNAPOLIS MD 21401

Phone/Email: 4102675601 CHARLIE@DEALEINSURANCE.COM

**MD**

# Agency Scorecard

## 1278542, RICHARD NORRIS INSURANCE AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $2,122 | 9999.9% | 13.9% | $2,122 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $2,122 | 10/31/2025 |
| | Mobile Home | $545 | 0.4% | 14.3% | $545 | 0.4% | $0 | 0.0% | 1 | 0.0% | 100.0% | $545 | 10/31/2025 |
| | Rental M.H. | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Travel Trailer | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$2,667** | **391.2%** | **14.0%** | **$2,667** | **391.2%** | **$0** | **0.0%** | **2** | **100.0%** | **100.0%** | **$1,334** | |
| **Total** | **Total** | **$2,667** | **391.2%** | **14.0%** | **$2,667** | **391.2%** | **$0** | **0.0%** | **2** | **100.0%** | **100.0%** | **$1,334** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 2 | 1 | $2,122 | 2 | 1 | $2,122 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **4** | **1** | **$2,122** | **4** | **1** | **2,122** | **0.25** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **4** | **1** | **$2,122** | **4** | **1** | **2,122** | **0.25** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1278542

RICHARD NORRIS INSURANCE AGENCY INC

Address: 2108 EMMORTON PARK RD STE 202

EDGEWOOD MD 21040

Phone/Email: 4102736665 RNORRISAGENCY@COMCAST.NET

MD

# Agency Scorecard

## 1278565, NORRIS,RICHARD

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $944 | 1.0% | 8.4% | $944 | 1.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $944 | 10/31/2025 |
| | Travel Trailer | $1,093 | 0.0% | 16.4% | $1,093 | 0.0% | $0 | -100.0% | 1 | 0.0% | 100.0% | $1,093 | 10/31/2025 |
| | **Total** | **$2,037** | **0.4%** | **12.6%** | **$2,037** | **0.4%** | **$0** | **-100.0%** | **2** | **0.0%** | **100.0%** | **$1,019** | |
| **Total** | **Total** | **$2,037** | **0.4%** | **12.6%** | **$2,037** | **0.4%** | **$0** | **-100.0%** | **2** | **0.0%** | **100.0%** | **$1,019** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: SUB

LBE UPN:1278542

1278542

NORRIS,RICHARD

Address: 2108 EMMORTON PARK RD STE 202

EDGEWOOD MD 21040

Phone/Email: 4102736665 RNORRISAGENCY@COMCAST.NET

MD

# Agency Scorecard

## 1278650, MARTIN INSURANCE AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $20,954 | 224.4% | 12.6% | $17,549 | 195.7% | $5,703 | 905.8% | 11 | 175.0% | 100.0% | $1,905 | 10/31/2025 |
| | Mobile Home | $2,575 | 2.3% | 14.2% | $2,575 | 2.3% | $0 | 0.0% | 3 | 0.0% | 100.0% | $858 | 10/31/2025 |
| | Motorcycle | $757 | -41.9% | 0.8% | $757 | -41.9% | $1,054 | -19.0% | 1 | 0.0% | 100.0% | $757 | 10/31/2025 |
| | **Total** | **$24,286** | **136.3%** | **12.0%** | **$20,881** | **114.1%** | **$6,757** | **261.5%** | **15** | **87.5%** | **100.0%** | **$1,619** | |
| **Total** | **Total** | **$24,286** | **136.3%** | **12.0%** | **$20,881** | **114.1%** | **$6,757** | **261.5%** | **15** | **87.5%** | **100.0%** | **$1,619** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 19 | 7 | $9,683 | 11 | 3 | $4,714 | 0.27 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **21** | **7** | **$9,683** | **13** | **3** | **4,714** | **0.23** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **21** | **7** | **$9,683** | **13** | **3** | **4,714** | **0.23** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1278650

MARTIN INSURANCE AGENCY INC

Address: 5735 B INDUSTRY LN STE 204

FREDERICK MD 21704

Phone/Email: 3016245858 PAULMARTINEKU.MARTININS@GMAIL.COM

MD

# Agency Scorecard

## 1278849, HERBERTA J. JONES INSURANCE & FINANCIAL SERVICES INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $5,265 | -1.5% | 12.0% | $5,265 | -1.5% | $3,001 | -43.9% | 2 | 0.0% | 100.0% | $2,633 | 10/31/2025 |
| | **Total** | **$5,265** | **-1.5%** | **12.0%** | **$5,265** | **-1.5%** | **$3,001** | **-43.9%** | **2** | **0.0%** | **100.0%** | **$2,633** | |
| **Total** | **Total** | **$5,265** | **-1.5%** | **12.0%** | **$5,265** | **-1.5%** | **$3,001** | **-43.9%** | **2** | **0.0%** | **100.0%** | **$2,633** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 3 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **3** | **0** | **$0** | **1** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **3** | **0** | **$0** | **1** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1278849

HERBERTA J. JONES INSURANCE & FINANCIAL SERVICES INC

Address: 4301 SILVER HILL RD

SUITLAND MD 20746

Phone/Email: 3018999330 HERBERTAJJONESAGENCY@GMAIL.COM

**MD**

# Agency Scorecard

## 1280327, LINDSAY,BRYON

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $14,598 | 27.7% | 19.5% | $13,901 | 21.6% | $672 | 9999.9% | 7 | 16.7% | 77.8% | $2,085 | 10/31/2025 |
| | Marine | $0 | -100.0% | 3591.8% | $0 | -100.0% | $0 | -100.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $1,656 | 7.9% | 12.0% | $0 | 0.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,656 | 10/31/2025 |
| | **Total** | **$16,254** | **25.4%** | **17.4%** | **$13,901** | **21.6%** | **$672** | **-13540.0%** | **8** | **14.3%** | **80.0%** | **$2,032** | |
| **Total** | **Total** | **$16,254** | **25.4%** | **17.4%** | **$13,901** | **21.6%** | **$672** | **-13540.0%** | **8** | **14.3%** | **80.0%** | **$2,032** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 11 | 3 | $3,495 | 6 | 2 | $2,798 | 0.33 | 0 | 1 | $2,116 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **11** | **3** | **$3,495** | **6** | **2** | **2,798** | **0.33** | **0** | **1** | **$2,116** | **0.0%** | |
| **Grand Total** | | **11** | **3** | **$3,495** | **6** | **2** | **2,798** | **0.33** | **0** | **1** | **$2,116** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Jake Nelson

Role: LBE

LBE UPN:1280327

LINDSAY,BRYON

Address: 3423 OLNEY-SANDY SPRING RD #4

OLNEY MD 20832

Phone/Email: 3017748522 BRYONLINDSAYINSURANCE@GMAIL.COM

MD

# Agency Scorecard

## 1360291, HARRY LINES INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $5,201 | 9999.9% | 15.2% | $5,201 | 9999.9% | $0 | 0.0% | 2 | 9999.9% | 66.7% | $2,601 | 10/31/2025 |
| | Home | $203 | 9999.9% | 16.3% | ($948) | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $213 | 23.8% | 5.0% | $213 | 23.8% | $0 | 0.0% | 1 | 0.0% | 100.0% | $213 | 10/31/2025 |
| | Off-Road Veh | $210 | -9.1% | -21.3% | $0 | 0.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $210 | 10/31/2025 |
| | **Total** | **$5,827** | **2098.9%** | **6.0%** | **$4,466** | **13035.3%** | **$0** | **0.0%** | **4** | **100.0%** | **66.7%** | **$1,457** | |
| **Total** | **Total** | **$5,827** | **2098.9%** | **6.0%** | **$4,466** | **13035.3%** | **$0** | **0.0%** | **4** | **100.0%** | **66.7%** | **$1,457** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 41 | 3 | $7,749 | 41 | 3 | $7,749 | 0.07 | 4 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 1 | 1 | $1,151 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **42** | **4** | **$8,900** | **41** | **3** | **7,749** | **0.07** | **4** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **42** | **4** | **$8,900** | **41** | **3** | **7,749** | **0.07** | **4** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1360291

HARRY LINES INC

Address: 207 4TH ST

LAUREL MD 20707

Phone/Email: 3017767450 BRAD@LINESINSURANCE.COM

**ME**

# Agency Scorecard

## 1066836, INSURANCE PROS INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $5,922 | 3.9% | 10.8% | $5,922 | 3.9% | $2,554 | 4.5% | 3 | 0.0% | 100.0% | $1,974 | 10/31/2025 |
| | Home | ($4,870) | -173.5% | -14.2% | ($1,467) | -122.1% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Marine | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | ($181) | -107.3% | 26.7% | $997 | -59.6% | $0 | 0.0% | 1 | -50.0% | 50.0% | ($181) | 10/31/2025 |
| | Motorcycle | ($126) | -148.6% | -63.9% | $0 | -100.0% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $3,724 | -6.0% | 13.5% | $3,724 | 2.4% | $348 | 2.1% | 2 | 0.0% | 100.0% | $1,862 | 10/31/2025 |
| | **Total** | **$4,469** | **-76.5%** | **11.5%** | **$9,176** | **-50.9%** | **$2,902** | **4.2%** | **6** | **-45.5%** | **54.5%** | **$745** | |
| **Total** | **Total** | **$4,469** | **-76.5%** | **11.5%** | **$9,176** | **-50.9%** | **$2,902** | **4.2%** | **6** | **-45.5%** | **54.5%** | **$745** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 1 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **1** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 16 | 0 | $0 | 14 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 5 | 0 | $0 | 4 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 1 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **23** | **0** | **$0** | **19** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **24** | **0** | **$0** | **19** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Sarah Nash

Role: LBE

LBE UPN:1066836

INSURANCE PROS INC

Address: 162 BANGOR RD STE A

ELLSWORTH ME 04605

Phone/Email: 2076641044 INFO@MAINECOASTINSURANCE.COM

**MI**

# Agency Scorecard

## 1148820, ALL FORMS INSURANCE AGENCY, INC.

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $13,106 | 36.0% | 9.9% | $10,605 | 44.2% | $669 | 9999.9% | 8 | 33.3% | 100.0% | $1,638 | 10/31/2025 |
| | Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $1,185 | 2.0% | 13.8% | $1,185 | 2.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,185 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $1,147 | 12.8% | 13.5% | $1,147 | 12.8% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,147 | 10/31/2025 |
| | Travel Trailer | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$15,438** | **30.6%** | **10.3%** | **$12,937** | **35.7%** | **$669** | **9999.9%** | **10** | **25.0%** | **100.0%** | **$1,544** | |
| **Total** | **Total** | **$15,438** | **30.6%** | **10.3%** | **$12,937** | **35.7%** | **$669** | **9999.9%** | **10** | **25.0%** | **100.0%** | **$1,544** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 10 | 0 | $0 | 7 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **10** | **0** | **$0** | **7** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 8 | 2 | $2,951 | 5 | 1 | $2,292 | 0.20 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 3 | 0 | $0 | 2 | 0 | $0 | 0.00 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **11** | **2** | **$2,951** | **7** | **1** | **2,292** | **0.14** | **3** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **21** | **2** | **$2,951** | **14** | **1** | **2,292** | **0.07** | **3** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Lucas Andrusiak

Role: LBE

LBE UPN:1148820

ALL FORMS INSURANCE AGENCY, INC.

Address: 5600 W MAPLE RD STE D403

WEST BLOOMFIELD MI 48322

Phone/Email: 2484968480 STEPHANIE@ALLFORMSINSURANCE.COM

MI

# Agency Scorecard

## 1278013, SHEILA HUGHES AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $33,464 | 4.4% | 8.0% | $32,622 | 16.1% | $6,017 | 116.2% | 37 | 37.0% | 80.4% | $904 | 10/31/2025 |
| | Mobile Home | $1,625 | 2.8% | 9.6% | $833 | 1.0% | $0 | 0.0% | 2 | 0.0% | 100.0% | $813 | 10/31/2025 |
| | **Total** | **$35,089** | **4.3%** | **8.1%** | **$33,455** | **15.7%** | **$6,017** | **116.2%** | **39** | **34.5%** | **81.3%** | **$900** | |
| **Total** | **Total** | **$35,089** | **4.3%** | **8.1%** | **$33,455** | **15.7%** | **$6,017** | **116.2%** | **39** | **34.5%** | **81.3%** | **$900** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 33 | 19 | $20,495 | 32 | 19 | $20,495 | 0.59 | 5 | 4 | $3,341 | 80.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **33** | **19** | **$20,495** | **32** | **19** | **20,495** | **0.59** | **5** | **4** | **$3,341** | **80.0%** | |
| **Grand Total** | | **33** | **19** | **$20,495** | **32** | **19** | **20,495** | **0.59** | **5** | **4** | **$3,341** | **80.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1278013

SHEILA HUGHES AGENCY INC

Address: 32740 GRAND RIVER AVE

FARMINGTON MI 48336

Phone/Email: 2484783100 S_HUGHESAGENCY@YAHOO.COM

MN

# Agency Scorecard

## 1279361, HARDESTY,KEVIN D

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $2,390 | -66.5% | 0.3% | $2,390 | -61.7% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$2,390** | **-66.5%** | **0.3%** | **$2,390** | **-61.7%** | **$0** | **0.0%** | **0** | **-100.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $44,921 | 258.0% | 174.8% | $44,921 | 258.0% | $6,271 | -562.1% | 15 | 150.0% | 93.8% | $2,995 | 10/31/2025 |
| | Home | $23,932 | -17.9% | 24.6% | $16,058 | -32.6% | $4,561 | 34984.6% | 10 | -9.1% | 90.9% | $2,393 | 10/31/2025 |
| | Marine | $789 | -9.6% | 1.4% | $789 | -9.6% | $0 | 0.0% | 1 | 0.0% | 100.0% | $789 | 10/31/2025 |
| | Mobile Home | $6,797 | -12.0% | 23.6% | $3,852 | 11.0% | $0 | 0.0% | 6 | 0.0% | 85.7% | $1,133 | 10/31/2025 |
| | Motorcycle | $3,670 | -20.8% | 0.2% | $3,555 | -21.2% | $0 | 0.0% | 6 | 0.0% | 85.7% | $612 | 10/31/2025 |
| | Off-Road Veh | $767 | -34.7% | 2.1% | $767 | -6.9% | $286 | -15.4% | 3 | 0.0% | 75.0% | $256 | 10/31/2025 |
| | Rental M.H. | $0 | -100.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Travel Trailer | $1,838 | 59.0% | 24.3% | $1,838 | 59.0% | $0 | -100.0% | 6 | 20.0% | 100.0% | $306 | 10/31/2025 |
| | **Total** | **$82,714** | **46.2%** | **72.2%** | **$71,780** | **52.0%** | **$11,118** | **-1570.6%** | **47** | **23.7%** | **90.4%** | **$1,760** | |
| **Total** | **Total** | **$85,104** | **33.6%** | **67.5%** | **$74,170** | **38.7%** | **$11,118** | **-1570.6%** | **47** | **20.5%** | **88.7%** | **$1,811** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 8 | 0 | $0 | 7 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **8** | **0** | **$0** | **7** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 31 | 10 | $35,158 | 31 | 10 | $35,158 | 0.32 | 4 | 3 | $10,628 | 75.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 2 | 1 | $321 | 2 | 1 | $321 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 3 | 1 | $367 | 3 | 1 | $367 | 0.33 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 2 | 1 | $277 | 2 | 1 | $277 | 0.50 | 1 | 1 | $277 | 100.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 4 | 1 | $334 | 4 | 1 | $334 | 0.25 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **42** | **14** | **$36,457** | **42** | **14** | **36,457** | **0.33** | **5** | **4** | **$10,905** | **80.0%** | |
| **Grand Total** | | **50** | **14** | **$36,457** | **49** | **14** | **36,457** | **0.29** | **5** | **4** | **$10,905** | **80.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: APMI-1051 Open

Role: LBE

LBE UPN:1279361

HARDESTY,KEVIN D

Address: 213 MEADOWLARK RD SE

SAINT MICHAEL MN 55376

Phone/Email: 7634972247 KEVIN@ALLINSURANCEMN.COM

MS

# Agency Scorecard

## 1289840, MARKETPLACE 4 INSURANCE LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $31,772 | 34.1% | 0.6% | $28,390 | 48.6% | $1,110 | -43.3% | 11 | -21.4% | 68.8% | $2,888 | 10/31/2025 |
| | **Total** | **$31,772** | **34.1%** | **0.6%** | **$28,390** | **48.6%** | **$1,110** | **-43.3%** | **11** | **-21.4%** | **68.8%** | **$2,888** | |
| Foremost Choice | Dwelling Fire | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| **Total** | **Total** | **$31,772** | **34.1%** | **0.6%** | **$28,390** | **48.6%** | **$1,110** | **-43.3%** | **11** | **-21.4%** | **68.8%** | **$2,888** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 15 | 2 | $10,142 | 12 | 2 | $10,142 | 0.17 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **15** | **2** | **$10,142** | **12** | **2** | **10,142** | **0.17** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **15** | **2** | **$10,142** | **12** | **2** | **10,142** | **0.17** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Jasmin Haskins

Role: SUB

LBE UPN:1289790

1289790

MARKETPLACE 4 INSURANCE LLC

Address: 601 2ND AVE N

AMORY MS 38821

Phone/Email: 6622576111 JOE@MARKETPLACE4INS.COM

# Agency Scorecard

**MS**

## 1289859, MARKETPLACE 4 INSURANCE LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Off-Road Veh | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| **Total** | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Terminated Accounts

Role: SUB

LBE UPN:1289790

1289790

MARKETPLACE 4 INSURANCE LLC

Address: 62 N DUNN ST

EUPORA MS 39744

Phone/Email: 8008624156 JOE@MARKETPLACE4INS.COM

**MS**

# Agency Scorecard

## 1319133, THE JAMES AGENCY, LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $32,332 | 131.8% | 109.0% | $31,260 | 124.1% | $2,893 | -25.3% | 5 | 0.0% | 50.0% | $6,466 | 10/31/2025 |
| | **Total** | **$32,332** | **131.8%** | **109.0%** | **$31,260** | **124.1%** | **$2,893** | **-25.3%** | **5** | **0.0%** | **50.0%** | **$6,466** | |
| Foremost Choice | Dwelling Fire | $112,258 | 37.6% | 38.3% | $94,357 | 44.3% | $8,809 | 171.0% | 55 | 12.2% | 83.3% | $2,041 | 10/31/2025 |
| | Home | $52,503 | 95.3% | 31.5% | $49,893 | 92.7% | $2,616 | 157.2% | 24 | 71.4% | 88.9% | $2,188 | 10/31/2025 |
| | Marine | $503 | 156.6% | 22.5% | $503 | 156.6% | $0 | 0.0% | 2 | 100.0% | 100.0% | $252 | 10/31/2025 |
| | Mobile Home | $100,371 | 15.6% | 30.1% | $83,362 | 10.9% | $2,254 | -70.5% | 55 | 5.8% | 91.7% | $1,825 | 10/31/2025 |
| | Motor Home | $3,344 | 9999.9% | 24.1% | $3,344 | 9999.9% | $0 | 0.0% | 2 | 9999.9% | 0.0% | $1,672 | 10/31/2025 |
| | Motorcycle | $638 | 168.1% | 189.4% | $638 | 168.1% | $53 | 9999.9% | 1 | 0.0% | 100.0% | $638 | 10/31/2025 |
| | Off-Road Veh | $3,021 | 30.1% | 2.9% | $3,021 | 43.7% | $0 | 0.0% | 15 | 15.4% | 93.8% | $201 | 10/31/2025 |
| | Rental M.H. | $26,950 | -9.1% | 34.1% | $22,019 | -5.7% | $1,032 | -37.8% | 31 | -11.4% | 79.5% | $869 | 10/31/2025 |
| | Travel Trailer | $348 | -89.1% | 9.9% | $99 | -96.9% | $291 | -0.7% | 2 | -50.0% | 50.0% | $174 | 10/31/2025 |
| | **Total** | **$299,936** | **29.9%** | **33.6%** | **$257,236** | **31.6%** | **$15,055** | **8.7%** | **187** | **10.7%** | **87.0%** | **$1,604** | |
| **Total** | **Total** | **$332,268** | **35.7%** | **41.9%** | **$288,496** | **37.7%** | **$17,948** | **1.3%** | **192** | **10.3%** | **85.3%** | **$1,731** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 675 | 5 | $14,579 | 528 | 4 | $13,360 | 0.01 | 46 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **675** | **5** | **$14,579** | **528** | **4** | **13,360** | **0.01** | **46** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 145 | 17 | $44,432 | 131 | 14 | $38,569 | 0.11 | 7 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 141 | 13 | $28,903 | 134 | 12 | $26,516 | 0.09 | 11 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 3 | 1 | $325 | 3 | 1 | $325 | 0.33 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 58 | 8 | $15,626 | 50 | 6 | $11,400 | 0.12 | 3 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 3 | 0 | $0 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 8 | 3 | $1,149 | 7 | 2 | $1,074 | 0.29 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 9 | 4 | $3,073 | 9 | 4 | $3,073 | 0.44 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 3 | 0 | $0 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **372** | **46** | **$93,508** | **342** | **39** | **80,957** | **0.11** | **23** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **1,047** | **51** | **$108,087** | **870** | **43** | **94,317** | **0.05** | **69** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Jasmin Haskins

Role: LBE

LBE UPN:1319133

THE JAMES AGENCY, LLC

Address: 1817 BROADWAY DR

HATTIESBURG MS 39402

Phone/Email: 6012682242 PATRICK@JAMESINS.COM

MS

# Agency Scorecard

## 1319240, JAMES,PATRICK

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $2,810 | 3.6% | 16.6% | $2,810 | 3.6% | $0 | 0.0% | 3 | 0.0% | 100.0% | $937 | 10/31/2025 |
| | Home | $2,138 | -5.5% | 14.9% | $2,138 | -5.5% | $0 | 0.0% | 1 | 0.0% | 100.0% | $2,138 | 10/31/2025 |
| | Mobile Home | $1,403 | -11.1% | 32.2% | $1,403 | -11.1% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,403 | 10/31/2025 |
| | **Total** | **$6,351** | **-3.1%** | **19.6%** | **$6,351** | **-3.1%** | **$0** | **0.0%** | **5** | **0.0%** | **100.0%** | **$1,270** | |
| **Total** | **Total** | **$6,351** | **-3.1%** | **19.6%** | **$6,351** | **-3.1%** | **$0** | **0.0%** | **5** | **0.0%** | **100.0%** | **$1,270** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Jasmin Haskins

Role: SUB

LBE UPN:1319133

1319133

JAMES,PATRICK

Address: 1817 BROADWAY DR

HATTIESBURG MS 39402

Phone/Email: 6012682242 INFO@JAMESINS.COM

**MS**

# Agency Scorecard

## 1440158, THE JAMES AGENCY, LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $11,254 | 130.3% | 45.0% | $11,254 | 130.3% | $0 | 0.0% | 6 | 50.0% | 100.0% | $1,876 | 10/31/2025 |
| | Home | $26,240 | -12.1% | 46.5% | $17,135 | -34.9% | $0 | -100.0% | 10 | -9.1% | 71.4% | $2,624 | 10/31/2025 |
| | Marine | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $22,096 | -17.3% | 24.9% | $26,213 | 12.9% | $4,802 | -45.5% | 10 | 66.7% | 90.9% | $2,210 | 10/31/2025 |
| | Motor Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $1,646 | 155.2% | 10.1% | $1,646 | 155.2% | $0 | 0.0% | 5 | 400.0% | 100.0% | $329 | 10/31/2025 |
| | Off-Road Veh | $433 | -5.5% | 8.3% | $433 | -5.5% | $0 | 0.0% | 2 | 0.0% | 100.0% | $217 | 10/31/2025 |
| | Rental M.H. | $7,465 | 79.1% | 31.2% | $5,662 | 35.9% | $0 | 0.0% | 7 | 40.0% | 100.0% | $1,066 | 10/31/2025 |
| | Travel Trailer | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$69,134** | **3.6%** | **36.5%** | **$62,343** | **4.5%** | **$4,802** | **-62.3%** | **40** | **37.9%** | **88.9%** | **$1,728** | |
| **Total** | **Total** | **$69,134** | **3.6%** | **36.5%** | **$62,343** | **4.5%** | **$4,802** | **-62.3%** | **40** | **37.9%** | **88.9%** | **$1,728** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | 55 | 2 | $6,215 | 48 | 2 | $6,215 | 0.04 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 73 | 3 | $8,021 | 63 | 1 | $1,860 | 0.02 | 6 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 35 | 5 | $6,601 | 32 | 5 | $6,601 | 0.16 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 4 | 4 | $1,017 | 3 | 4 | $1,017 | 1.33 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 2 | 2 | $2,940 | 2 | 2 | $2,940 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **171** | **16** | **$24,794** | **150** | **14** | **18,633** | **0.09** | **9** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **171** | **16** | **$24,794** | **150** | **14** | **18,633** | **0.09** | **9** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: SUB

LBE UPN:1319133

1319133

THE JAMES AGENCY, LLC

Address: 1403 S MAIN ST STE D2

POPLARVILLE MS 39470

Phone/Email: 6017952939 FRONTDESK@POPLARVILLEINSURANCE.COM

**MT**

# Agency Scorecard

## 163217, ADVANTAGE INSURANCE AGENCY LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $3,858 | 514.3% | 0.5% | $3,223 | 413.2% | $0 | 0.0% | 1 | 0.0% | 50.0% | $3,858 | 10/31/2025 |
| | **Total** | **$3,858** | **514.3%** | **0.5%** | **$3,223** | **413.2%** | **$0** | **0.0%** | **1** | **0.0%** | **50.0%** | **$3,858** | |
| Foremost Choice | Dwelling Fire | $27,618 | -3.1% | 13.1% | $27,618 | 22.9% | $1,809 | 110.6% | 12 | 0.0% | 92.3% | $2,302 | 10/31/2025 |
| | Home | $52,987 | 26.5% | 91.1% | $42,673 | 21.9% | $10,687 | 21.8% | 21 | 50.0% | 91.3% | $2,523 | 10/31/2025 |
| | Marine | $837 | 61.0% | 9.4% | $837 | 61.0% | $0 | 0.0% | 2 | 0.0% | 100.0% | $419 | 10/31/2025 |
| | Mobile Home | $18,650 | -22.6% | 10.3% | $16,879 | -23.4% | $3,522 | 84.7% | 12 | -20.0% | 80.0% | $1,554 | 10/31/2025 |
| | Motor Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Off-Road Veh | $1,313 | 36.9% | -3.2% | $288 | -16.8% | $0 | 0.0% | 1 | -50.0% | 50.0% | $1,313 | 10/31/2025 |
| | Rental M.H. | $15,713 | 6.5% | 180.7% | $15,713 | 6.5% | $0 | 0.0% | 5 | 0.0% | 100.0% | $3,143 | 10/31/2025 |
| | Travel Trailer | $683 | -45.5% | 7.2% | $253 | -79.8% | $0 | 0.0% | 2 | -33.3% | 50.0% | $342 | 10/31/2025 |
| | **Total** | **$117,801** | **5.2%** | **64.4%** | **$104,261** | **8.2%** | **$16,018** | **38.8%** | **55** | **3.8%** | **85.9%** | **$2,142** | |
| **Total** | **Total** | **$121,659** | **8.0%** | **62.8%** | **$107,484** | **10.8%** | **$16,018** | **38.8%** | **56** | **3.7%** | **84.8%** | **$2,172** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 155 | 1 | $1,781 | 153 | 1 | $1,781 | 0.01 | 13 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **155** | **1** | **$1,781** | **153** | **1** | **1,781** | **0.01** | **13** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 26 | 1 | $3,054 | 23 | 1 | $3,054 | 0.04 | 3 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 52 | 9 | $20,640 | 48 | 6 | $11,799 | 0.13 | 3 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 2 | 1 | $422 | 2 | 1 | $422 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **84** | **11** | **$24,116** | **77** | **8** | **15,275** | **0.10** | **6** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **239** | **12** | **$25,897** | **230** | **9** | **17,056** | **0.04** | **19** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Ray Ames

Role: LBE

LBE UPN:163217

ADVANTAGE INSURANCE AGENCY LLC

Address: 207 SMELTER AVE NE STE 2

GREAT FALLS MT 59404

Phone/Email: 4064522956 TAUNA@ADVINS.ORG

**MT**

# Agency Scorecard

## 1122524, JM INSURANCE GROUP

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $6,511 | -47.2% | -138.1% | $8,178 | -48.9% | $0 | 0.0% | 1 | -75.0% | 12.5% | $6,511 | 10/31/2025 |
| | **Total** | **$6,511** | **-47.2%** | **-138.1%** | **$8,178** | **-48.9%** | **$0** | **0.0%** | **1** | **-75.0%** | **12.5%** | **$6,511** | |
| Foremost Choice | Dwelling Fire | $15,629 | 9999.9% | 12.8% | $15,629 | 9999.9% | $6,110 | 9999.9% | 4 | 9999.9% | 133.3% | $3,907 | 10/31/2025 |
| | Home | $98,384 | 80.4% | 13.6% | $92,032 | 63.9% | $8,235 | 83.9% | 42 | 68.0% | 84.0% | $2,342 | 10/31/2025 |
| | Mobile Home | $51,730 | 65.3% | 114.8% | $43,600 | 88.2% | $3,513 | 104.1% | 15 | 66.7% | 78.9% | $3,449 | 10/31/2025 |
| | Motor Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $649 | -50.4% | -1.7% | $649 | -43.2% | $0 | 0.0% | 2 | 0.0% | 100.0% | $325 | 10/31/2025 |
| | Off-Road Veh | $493 | -5.4% | 11.2% | $493 | -5.4% | $0 | 0.0% | 1 | 0.0% | 100.0% | $493 | 10/31/2025 |
| | Rental M.H. | $23,924 | 69.7% | 14.7% | $22,119 | 66.8% | $2,268 | 9999.9% | 14 | 40.0% | 87.5% | $1,709 | 10/31/2025 |
| | Travel Trailer | $1,479 | -12.4% | 26.9% | $1,479 | -12.4% | $0 | 0.0% | 3 | -25.0% | 60.0% | $493 | 10/31/2025 |
| | **Total** | **$192,288** | **85.9%** | **39.3%** | **$176,001** | **83.5%** | **$20,126** | **224.6%** | **81** | **58.8%** | **84.4%** | **$2,374** | |
| **Total** | **Total** | **$198,799** | **71.7%** | **26.6%** | **$184,179** | **64.6%** | **$20,126** | **224.6%** | **82** | **49.1%** | **78.8%** | **$2,424** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 24 | 4 | $4,925 | 16 | 4 | $4,925 | 0.25 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **24** | **4** | **$4,925** | **16** | **4** | **4,925** | **0.25** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 112 | 3 | $12,043 | 105 | 3 | $12,043 | 0.03 | 11 | 1 | $6,110 | 9.1% | 10/31/2025 |
| | Home | 146 | 25 | $49,921 | 121 | 20 | $39,888 | 0.17 | 9 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 75 | 10 | $22,602 | 64 | 7 | $15,976 | 0.11 | 5 | 1 | $1,421 | 20.0% | 10/31/2025 |
| | Motor Home | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 4 | 0 | $0 | 4 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 11 | 6 | $9,483 | 9 | 6 | $9,483 | 0.67 | 3 | 1 | $2,268 | 33.3% | 10/31/2025 |
| | Travel Trailer | 7 | 1 | $277 | 6 | 1 | $277 | 0.17 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **358** | **45** | **$94,326** | **312** | **37** | **77,667** | **0.12** | **28** | **3** | **$9,799** | **10.7%** | |
| **Grand Total** | | **382** | **49** | **$99,251** | **328** | **41** | **82,592** | **0.13** | **28** | **3** | **$9,799** | **10.7%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Ray Ames

Role: LBE

LBE UPN:1122524

JM INSURANCE GROUP

Address: 513 HILLTOP RD STE 7

BILLINGS MT 59105

Phone/Email: 4065348008 JENNIFER@JMINSGROUP.COM

**MT**

# Agency Scorecard

## 1274314, ANVIL INSURANCE SERVICES LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $14,021 | -25.0% | 0.4% | $9,782 | -18.5% | $0 | -100.0% | 3 | -40.0% | 33.3% | $4,674 | 10/31/2025 |
| | **Total** | **$14,021** | **-25.0%** | **0.4%** | **$9,782** | **-18.5%** | **$0** | **-100.0%** | **3** | **-40.0%** | **33.3%** | **$4,674** | |
| Foremost Choice | Dwelling Fire | $5,951 | -23.7% | 7.1% | $8,247 | 5.7% | $2,806 | -48.6% | 3 | -25.0% | 37.5% | $1,984 | 10/31/2025 |
| | Home | $606,550 | 20.0% | 46.0% | $530,104 | 17.6% | $33,109 | -37.4% | 239 | 15.5% | 84.2% | $2,538 | 10/31/2025 |
| | Marine | $142 | -77.1% | 3.9% | $401 | -35.4% | $0 | 0.0% | 1 | -50.0% | 50.0% | $142 | 10/31/2025 |
| | Mobile Home | $19,812 | 18.6% | 11.5% | $19,591 | -4.4% | ($97) | -98.1% | 6 | -25.0% | 46.2% | $3,302 | 10/31/2025 |
| | Motor Home | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $428 | -83.1% | 5.2% | $428 | -83.1% | $0 | 0.0% | 1 | -66.7% | 33.3% | $428 | 10/31/2025 |
| | Off-Road Veh | $1,101 | 2.7% | 10.8% | $1,101 | 2.7% | $61 | 9999.9% | 3 | 0.0% | 60.0% | $367 | 10/31/2025 |
| | Rental M.H. | $32,310 | 0.2% | 13.0% | $29,809 | 7.4% | $475 | -257.3% | 11 | -8.3% | 78.6% | $2,937 | 10/31/2025 |
| | Travel Trailer | $10,953 | 29.9% | 9.0% | $9,411 | 24.6% | $351 | -1.1% | 19 | 18.8% | 79.2% | $576 | 10/31/2025 |
| | **Total** | **$677,247** | **17.7%** | **41.7%** | **$599,092** | **15.4%** | **$36,705** | **-31.0%** | **283** | **11.0%** | **80.2%** | **$2,393** | |
| **Total** | **Total** | **$691,268** | **16.4%** | **40.7%** | **$608,874** | **14.6%** | **$36,705** | **-33.1%** | **286** | **10.0%** | **79.0%** | **$2,417** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 402 | 4 | $6,444 | 338 | 2 | $3,404 | 0.01 | 23 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **402** | **4** | **$6,444** | **338** | **2** | **3,404** | **0.01** | **23** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 97 | 4 | $12,358 | 84 | 3 | $11,539 | 0.04 | 4 | 1 | $3,562 | 25.0% | 10/31/2025 |
| | Home | 275 | 77 | $164,793 | 211 | 62 | $130,509 | 0.29 | 15 | 2 | $3,865 | 13.3% | 10/31/2025 |
| | Marine | 3 | 0 | $0 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 39 | 5 | $8,410 | 38 | 5 | $8,410 | 0.13 | 7 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 10 | 2 | $601 | 10 | 2 | $601 | 0.20 | 1 | 1 | $371 | 100.0% | 10/31/2025 |
| | Rental M.H. | 5 | 2 | $1,529 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 27 | 8 | $5,030 | 23 | 7 | $4,454 | 0.30 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **457** | **98** | **$192,721** | **373** | **79** | **155,513** | **0.21** | **28** | **4** | **$7,798** | **14.3%** | |
| **Grand Total** | | **859** | **102** | **$199,165** | **711** | **81** | **158,917** | **0.11** | **51** | **4** | **$7,798** | **7.8%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Ray Ames

Role: LBE

LBE UPN:1274314

ANVIL INSURANCE SERVICES LLC

Address: 3124 1ST AVE N

BILLINGS MT 59101

Phone/Email: 4062593828 SERVICE@ANVIL-INSURANCE.COM

NC

# Agency Scorecard

## 752325, WILLIAM AVON FINANCIAL, LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Mobile Home | $990 | 1.2% | 18.7% | $990 | 1.2% | $0 | 0.0% | 1 | 0.0% | 100.0% | $990 | 10/31/2025 |
| | Motor Home | $0 | -100.0% | 16.9% | $0 | -100.0% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$990** | **-17.8%** | **18.5%** | **$990** | **-17.8%** | **$0** | **0.0%** | **1** | **-50.0%** | **50.0%** | **$990** | |
| **Total** | **Total** | **$990** | **-17.8%** | **18.5%** | **$990** | **-17.8%** | **$0** | **0.0%** | **1** | **-50.0%** | **50.0%** | **$990** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Mobile Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **1** | **0** | **$0** | **1** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **1** | **0** | **$0** | **1** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:752325

WILLIAM AVON FINANCIAL, LLC

Address: 2500 BRIDGES ST STE 12 INSIDE

MOREHEAD CITY NC 28557

Phone/Email: 2525580650 BILL@WILLIAMAVON.COM

NC

# Agency Scorecard

## 1261761, THE RYAN INSURANCE GROUP, LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $16,337 | 18.5% | 14.2% | $17,737 | 43.8% | $0 | -100.0% | 12 | 50.0% | 75.0% | $1,361 | 10/31/2025 |
| | Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$16,337** | **18.5%** | **14.2%** | **$17,737** | **43.8%** | **$0** | **-100.0%** | **12** | **50.0%** | **75.0%** | **$1,361** | |
| **Total** | **Total** | **$16,337** | **18.5%** | **14.2%** | **$17,737** | **43.8%** | **$0** | **-100.0%** | **12** | **50.0%** | **75.0%** | **$1,361** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | 16 | 8 | $16,657 | 14 | 8 | $16,657 | 0.57 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 2 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **18** | **8** | **$16,657** | **15** | **8** | **16,657** | **0.53** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **18** | **8** | **$16,657** | **15** | **8** | **16,657** | **0.53** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1261761

THE RYAN INSURANCE GROUP, LLC

Address: 10801 JOHNSTON RD STE 208

CHARLOTTE NC 28226

Phone/Email: 7047058989 DIANE@THERYANINSURANCEGROUP.COM

NC

# Agency Scorecard

## 1277669, MIKE MATHEWSON INS SERVICES INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $67,555 | 1.4% | 12.7% | $59,772 | 1.7% | $6,556 | 40.8% | 70 | -5.4% | 77.8% | $965 | 10/31/2025 |
| | Mobile Home | $35,223 | -3.6% | 61.2% | $27,968 | 7.1% | $1,845 | 9.8% | 37 | -15.9% | 77.1% | $952 | 10/31/2025 |
| | Motor Home | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Off-Road Veh | $1,403 | 63.7% | 10.5% | $1,403 | 79.4% | $326 | 334.7% | 14 | 100.0% | 82.4% | $100 | 10/31/2025 |
| | Rental M.H. | $4,147 | 43.6% | 19.0% | $4,147 | 59.6% | $0 | 0.0% | 8 | 33.3% | 88.9% | $518 | 10/31/2025 |
| | Travel Trailer | $3,726 | -20.5% | 14.0% | $2,527 | -46.1% | $0 | -100.0% | 5 | 0.0% | 71.4% | $745 | 10/31/2025 |
| | **Total** | **$112,054** | **0.3%** | **28.9%** | **$95,817** | **4.1%** | **$8,727** | **6.9%** | **134** | **-1.5%** | **78.4%** | **$836** | |
| **Total** | **Total** | **$112,054** | **0.3%** | **28.9%** | **$95,817** | **4.1%** | **$8,727** | **6.9%** | **134** | **-1.5%** | **78.4%** | **$836** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | 23 | 16 | $17,420 | 19 | 12 | $12,564 | 0.63 | 5 | 2 | $2,606 | 40.0% | 10/31/2025 |
| | Mobile Home | 10 | 4 | $4,058 | 9 | 4 | $4,058 | 0.44 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 11 | 10 | $871 | 11 | 10 | $871 | 0.91 | 2 | 2 | $251 | 100.0% | 10/31/2025 |
| | Rental M.H. | 6 | 3 | $1,897 | 6 | 3 | $1,897 | 0.50 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 4 | 2 | $2,313 | 3 | 2 | $2,313 | 0.67 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **54** | **35** | **$26,559** | **48** | **31** | **21,703** | **0.65** | **8** | **4** | **$2,857** | **50.0%** | |
| **Grand Total** | | **54** | **35** | **$26,559** | **48** | **31** | **21,703** | **0.65** | **8** | **4** | **$2,857** | **50.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Kim Litman

Role: LBE

LBE UPN:1277669

MIKE MATHEWSON INS SERVICES INC

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GRANITE FALLS NC 28630

Phone/Email: 8283963369 MIKE@MMAGENCYNC.COM

NC

# Agency Scorecard

## 1277945, THE KISER AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $159,316 | 13.5% | 15.5% | $124,283 | 6.8% | $16,977 | 99.6% | 141 | 3.7% | 87.0% | $1,130 | 10/31/2025 |
| | Marine | $4,094 | 57.7% | 17.1% | $4,094 | 57.7% | $1,866 | -5010.5% | 7 | 16.7% | 87.5% | $585 | 10/31/2025 |
| | Mobile Home | $89,271 | 6.8% | 33.9% | $72,388 | -1.1% | $1,973 | 85.6% | 64 | 1.6% | 97.0% | $1,395 | 10/31/2025 |
| | Motor Home | $2,417 | 5.1% | 16.3% | $2,417 | 5.1% | $0 | 0.0% | 2 | 0.0% | 66.7% | $1,209 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 219.9% | $0 | 0.0% | $0 | -100.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Off-Road Veh | $1,359 | 7.5% | 4.2% | $1,359 | 7.5% | $0 | -100.0% | 7 | 0.0% | 87.5% | $194 | 10/31/2025 |
| | Rental M.H. | $22,540 | 41.4% | 19.0% | $19,801 | 29.2% | ($46) | -132.9% | 28 | 3.7% | 96.6% | $805 | 10/31/2025 |
| | Travel Trailer | $2,062 | -0.3% | 161.5% | $1,361 | -34.2% | $0 | 0.0% | 4 | 0.0% | 100.0% | $516 | 10/31/2025 |
| | **Total** | **$281,059** | **13.3%** | **23.0%** | **$225,703** | **5.9%** | **$20,770** | **128.5%** | **253** | **3.3%** | **90.4%** | **$1,111** | |
| **Total** | **Total** | **$281,059** | **13.3%** | **23.0%** | **$225,703** | **5.9%** | **$20,770** | **128.5%** | **253** | **3.3%** | **90.4%** | **$1,111** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | 82 | 26 | $38,803 | 75 | 23 | $35,031 | 0.31 | 4 | 2 | $4,620 | 50.0% | 10/31/2025 |
| | Marine | 2 | 2 | $1,866 | 2 | 2 | $1,866 | 1.00 | 2 | 2 | $1,866 | 100.0% | 10/31/2025 |
| | Mobile Home | 18 | 3 | $2,698 | 13 | 3 | $2,698 | 0.23 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 4 | 1 | $241 | 3 | 1 | $241 | 0.33 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 1 | 1 | $75 | 1 | 1 | $75 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 9 | 2 | $4,495 | 6 | 1 | $3,410 | 0.17 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **118** | **35** | **$48,178** | **102** | **31** | **43,321** | **0.30** | **6** | **4** | **$6,486** | **66.7%** | |
| **Grand Total** | | **118** | **35** | **$48,178** | **102** | **31** | **43,321** | **0.30** | **6** | **4** | **$6,486** | **66.7%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Wade Baccich

Role: LBE

LBE UPN:1277945

THE KISER AGENCY INC

Address: 536 HAYWOOD RD

ASHEVILLE NC 28806

Phone/Email: 8282539500 KEITH@KISERINSURANCEAGENCY.COM

NC

# Agency Scorecard

## 1277992, O L MEEK INSURANCE AGENCY, INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $36,942 | 12.8% | 13.6% | $35,600 | 21.9% | $12,459 | -2.5% | 24 | 20.0% | 88.9% | $1,539 | 10/31/2025 |
| | Marine | $372 | 1.9% | 21.6% | $372 | 1.9% | $0 | 0.0% | 2 | 0.0% | 100.0% | $186 | 10/31/2025 |
| | Mobile Home | $137,565 | -9.8% | 20.6% | $115,362 | -13.2% | $6,832 | -58.9% | 105 | -11.0% | 86.1% | $1,310 | 10/31/2025 |
| | Motorcycle | $343 | 0.3% | 5.9% | $343 | 46.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $343 | 10/31/2025 |
| | Off-Road Veh | $60 | 0.0% | 3.4% | $60 | 0.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $60 | 10/31/2025 |
| | Rental M.H. | $12,846 | -22.3% | 19.7% | $10,543 | -7.5% | $2,543 | -39.6% | 19 | -9.5% | 79.2% | $676 | 10/31/2025 |
| | Travel Trailer | ($320) | -138.2% | 7.7% | $215 | -74.3% | $0 | 0.0% | 1 | -50.0% | 50.0% | ($320) | 10/31/2025 |
| | **Total** | **$187,808** | **-7.7%** | **19.4%** | **$162,495** | **-7.2%** | **$21,834** | **-35.0%** | **153** | **-7.3%** | **85.5%** | **$1,228** | |
| **Total** | **Total** | **$187,808** | **-7.7%** | **19.4%** | **$162,495** | **-7.2%** | **$21,834** | **-35.0%** | **153** | **-7.3%** | **85.5%** | **$1,228** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 12 | 7 | $7,126 | 11 | 7 | $7,126 | 0.64 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 15 | 4 | $5,774 | 14 | 4 | $5,774 | 0.29 | 1 | 1 | $625 | 100.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 5 | 3 | $3,568 | 4 | 3 | $3,568 | 0.75 | 1 | 1 | $616 | 100.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **33** | **14** | **$16,468** | **30** | **14** | **16,468** | **0.47** | **3** | **2** | **$1,241** | **66.7%** | |
| **Grand Total** | | **33** | **14** | **$16,468** | **30** | **14** | **16,468** | **0.47** | **3** | **2** | **$1,241** | **66.7%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Kim Litman

Role: LBE

LBE UPN:1277992

O L MEEK INSURANCE AGENCY, INC

Address: 207 S MAIN ST

WARRENTON NC 27589

Phone/Email: 2522571333 JENNIFER@OLMEEKINS.COM

NC

# Agency Scorecard

## 1278733, STEPHEN L. WEST INSURANCE SERVICES, INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $137,053 | 13.9% | 77.5% | $119,002 | 16.9% | $9,352 | 312.0% | 69 | 9.5% | 94.5% | $1,986 | 10/31/2025 |
| | Marine | $4,171 | 12.2% | 17.8% | $4,214 | 23.0% | $0 | 0.0% | 8 | 14.3% | 80.0% | $521 | 10/31/2025 |
| | Mobile Home | $54,366 | 13.2% | 45.6% | $45,255 | 7.4% | $2,188 | 1.4% | 38 | 0.0% | 100.0% | $1,431 | 10/31/2025 |
| | Motorcycle | $1,495 | -23.3% | 3.9% | $1,495 | -25.5% | $0 | 0.0% | 2 | -50.0% | 50.0% | $748 | 10/31/2025 |
| | Off-Road Veh | $838 | 27.7% | 7.2% | $838 | 27.7% | $0 | 0.0% | 8 | 33.3% | 88.9% | $105 | 10/31/2025 |
| | Rental M.H. | $2,723 | 12.5% | 36.5% | $1,695 | 14.5% | $153 | 9999.9% | 5 | 0.0% | 100.0% | $545 | 10/31/2025 |
| | Travel Trailer | $1,689 | 31.4% | 13.7% | $969 | 21.0% | $387 | 188.8% | 4 | 33.3% | 100.0% | $422 | 10/31/2025 |
| | **Total** | **$202,335** | **13.4%** | **65.5%** | **$173,468** | **13.9%** | **$12,080** | **164.9%** | **134** | **6.3%** | **93.7%** | **$1,510** | |
| **Total** | **Total** | **$202,335** | **13.4%** | **65.5%** | **$173,468** | **13.9%** | **$12,080** | **164.9%** | **134** | **6.3%** | **93.7%** | **$1,510** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | 19 | 10 | $13,264 | 16 | 9 | $11,881 | 0.56 | 0 | 2 | $2,374 | 0.0% | 10/31/2025 |
| | Marine | 6 | 3 | $1,303 | 6 | 3 | $1,303 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 5 | 3 | $287 | 5 | 3 | $287 | 0.60 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 1 | $254 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **32** | **17** | **$15,108** | **29** | **15** | **13,471** | **0.52** | **0** | **2** | **$2,374** | **0.0%** | |
| **Grand Total** | | **32** | **17** | **$15,108** | **29** | **15** | **13,471** | **0.52** | **0** | **2** | **$2,374** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Kim Litman

Role: LBE

LBE UPN:1278733

STEPHEN L. WEST INSURANCE SERVICES, INC

Address: 2755A CHARLES BLVD

GREENVILLE NC 27858

Phone/Email: 2527563212 STEPHEN@STEPHENWESTAGENCIES.COM

NC

# Agency Scorecard

## 1278740, THE AUSTIN AGENCY INCORPORATED

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $69,363 | -24.2% | 46.2% | $55,401 | -30.6% | $4,436 | -7.8% | 51 | -10.5% | 78.5% | $1,360 | 10/31/2025 |
| | Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $14,736 | 14.8% | 18.0% | $12,634 | 41.1% | $2,967 | 9999.9% | 10 | 11.1% | 90.9% | $1,474 | 10/31/2025 |
| | Off-Road Veh | $305 | -1.9% | 3.5% | $305 | -1.9% | $0 | 0.0% | 1 | 0.0% | 100.0% | $305 | 10/31/2025 |
| | Rental M.H. | ($830) | -142.0% | 11.7% | ($830) | -142.0% | $0 | 0.0% | 1 | -66.7% | 33.3% | ($830) | 10/31/2025 |
| | Travel Trailer | $409 | 9999.9% | 0.0% | $409 | 9999.9% | $409 | 9999.9% | 1 | 9999.9% | 100.0% | $409 | 10/31/2025 |
| | **Total** | **$83,983** | **-21.2%** | **42.2%** | **$67,919** | **-25.4%** | **$7,812** | **62.4%** | **64** | **-8.6%** | **79.0%** | **$1,312** | |
| **Total** | **Total** | **$83,983** | **-21.2%** | **42.2%** | **$67,919** | **-25.4%** | **$7,812** | **62.4%** | **64** | **-8.6%** | **79.0%** | **$1,312** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 17 | 8 | $12,311 | 17 | 8 | $12,311 | 0.47 | 3 | 1 | $4,838 | 33.3% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 2 | 2 | $3,434 | 1 | 1 | $535 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 2 | 1 | $409 | 2 | 1 | $409 | 0.50 | 2 | 1 | $409 | 50.0% | 10/31/2025 |
| | **Total** | **21** | **11** | **$16,154** | **20** | **10** | **13,255** | **0.50** | **5** | **2** | **$5,247** | **40.0%** | |
| **Grand Total** | | **21** | **11** | **$16,154** | **20** | **10** | **13,255** | **0.50** | **5** | **2** | **$5,247** | **40.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Kim Litman

Role: LBE

LBE UPN:1278740

THE AUSTIN AGENCY INCORPORATED

Address: 4614-B4 WILGROVE MINT HILL RD

CHARLOTTE NC 28227

Phone/Email: 7045369800 AGENCYMAILBOX@THEAUSTINAGENCYINC.COM

# Agency Scorecard

**NC**

## 1279112, NOBLES INS AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $76,765 | 22.4% | 23.1% | $75,676 | 22.8% | $824 | -131.8% | 27 | 42.1% | 84.4% | $2,843 | 10/31/2025 |
| | Marine | $0 | -100.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $118,921 | 2.4% | 24.4% | $109,427 | -1.3% | $1,924 | -72.5% | 53 | -5.4% | 94.6% | $2,244 | 10/31/2025 |
| | Motor Home | $0 | -100.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $13,514 | -20.2% | 20.2% | $11,166 | -23.6% | $0 | -100.0% | 12 | -7.7% | 80.0% | $1,126 | 10/31/2025 |
| | Travel Trailer | $123 | -85.2% | 15.5% | $123 | -85.2% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$209,323** | **5.5%** | **23.5%** | **$196,392** | **4.7%** | **$2,748** | **-43.4%** | **92** | **3.4%** | **88.5%** | **$2,275** | |
| **Total** | **Total** | **$209,323** | **5.5%** | **23.5%** | **$196,392** | **4.7%** | **$2,748** | **-43.4%** | **92** | **3.4%** | **88.5%** | **$2,275** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 50 | 13 | $19,410 | 46 | 12 | $17,268 | 0.26 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 13 | 0 | $0 | 11 | 0 | $0 | 0.00 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 1 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 8 | 2 | $2,896 | 4 | 1 | $1,391 | 0.25 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **72** | **15** | **$22,306** | **61** | **13** | **18,659** | **0.21** | **3** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **72** | **15** | **$22,306** | **61** | **13** | **18,659** | **0.21** | **3** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Marsha Liles

Role: LBE

LBE UPN:1279112

NOBLES INS AGENCY INC

Address: 557 PYLON DR STE A

RALEIGH NC 27606

Phone/Email: 9198333803 ANGEL.SARCHET@KING-INSURANCE.COM

NC

# Agency Scorecard

## 1279617, JONES-BYRD INSURANCE GROUP, LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $180,948 | 61.6% | 24.6% | $127,769 | 27.8% | $13,970 | 122.7% | 119 | 28.0% | 85.0% | $1,521 | 10/31/2025 |
| | Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $96,430 | 7.0% | 37.0% | $82,629 | 11.1% | $11,331 | 51.5% | 51 | -1.9% | 87.9% | $1,891 | 10/31/2025 |
| | Motor Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $698 | 2.3% | 3.1% | $698 | 2.3% | $0 | 0.0% | 1 | 0.0% | 100.0% | $698 | 10/31/2025 |
| | Rental M.H. | $22,619 | -8.7% | 33.9% | $18,746 | -14.8% | ($22) | -100.5% | 26 | 4.0% | 78.8% | $870 | 10/31/2025 |
| | Travel Trailer | $1,087 | -3.5% | 12.9% | $510 | -44.6% | $0 | 0.0% | 3 | 0.0% | 100.0% | $362 | 10/31/2025 |
| | **Total** | **$301,782** | **32.0%** | **29.8%** | **$230,352** | **16.3%** | **$25,279** | **40.1%** | **200** | **14.9%** | **85.1%** | **$1,509** | |
| **Total** | **Total** | **$301,782** | **32.0%** | **29.8%** | **$230,352** | **16.3%** | **$25,279** | **40.1%** | **200** | **14.9%** | **85.1%** | **$1,509** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | 80 | 47 | $80,606 | 69 | 38 | $67,543 | 0.55 | 5 | 2 | $3,004 | 40.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 17 | 6 | $8,625 | 16 | 4 | $5,474 | 0.25 | 5 | 1 | $1,752 | 20.0% | 10/31/2025 |
| | Motor Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 12 | 8 | $12,470 | 12 | 8 | $12,470 | 0.67 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **109** | **61** | **$101,701** | **97** | **50** | **85,487** | **0.52** | **10** | **3** | **$4,756** | **30.0%** | |
| **Grand Total** | | **109** | **61** | **$101,701** | **97** | **50** | **85,487** | **0.52** | **10** | **3** | **$4,756** | **30.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Marsha Liles

Role: LBE

LBE UPN:1279617

JONES-BYRD INSURANCE GROUP, LLC

Address: 1006 W CUMBERLAND ST

DUNN NC 28334

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NC

# Agency Scorecard

## 1279773, KEENE & ASSOCIATES INSURANCE AGENCY, INC.

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $177,842 | 30.1% | 51.1% | $161,626 | 33.9% | $9,150 | -58.1% | 85 | 39.3% | 85.9% | $2,092 | 10/31/2025 |
| | Marine | $1,457 | -25.9% | 7.7% | $1,457 | -14.9% | $0 | -100.0% | 2 | -60.0% | 40.0% | $729 | 10/31/2025 |
| | Mobile Home | $155,828 | 2.3% | 31.4% | $129,229 | 0.7% | $1,466 | -81.1% | 86 | -6.5% | 86.9% | $1,812 | 10/31/2025 |
| | Motor Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $895 | 1.4% | 8.2% | $895 | 1.4% | $0 | 0.0% | 2 | 0.0% | 100.0% | $448 | 10/31/2025 |
| | Off-Road Veh | $3,857 | -58.3% | 2.6% | $4,160 | -48.8% | ($245) | -113.2% | 36 | 9.1% | 78.3% | $107 | 10/31/2025 |
| | Rental M.H. | $32,918 | 33.8% | 75.4% | $29,179 | 28.5% | $855 | 2.5% | 35 | 16.7% | 100.0% | $941 | 10/31/2025 |
| | Travel Trailer | $1,304 | -33.3% | 13.3% | $1,304 | -33.3% | $0 | 0.0% | 4 | 33.3% | 80.0% | $326 | 10/31/2025 |
| | **Total** | **$374,101** | **14.2%** | **42.7%** | **$327,850** | **15.3%** | **$11,226** | **-65.5%** | **250** | **10.6%** | **85.9%** | **$1,496** | |
| **Total** | **Total** | **$374,101** | **14.2%** | **42.7%** | **$327,850** | **15.3%** | **$11,226** | **-65.5%** | **250** | **10.6%** | **85.9%** | **$1,496** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | 96 | 38 | $63,439 | 87 | 35 | $58,785 | 0.40 | 2 | 2 | $4,339 | 100.0% | 10/31/2025 |
| | Marine | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 28 | 7 | $12,771 | 20 | 7 | $12,771 | 0.35 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 16 | 13 | $2,562 | 14 | 12 | $2,413 | 0.86 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 17 | 5 | $5,852 | 15 | 4 | $5,636 | 0.27 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 4 | 2 | $792 | 3 | 2 | $792 | 0.67 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **166** | **65** | **$85,416** | **144** | **60** | **80,397** | **0.42** | **4** | **2** | **$4,339** | **50.0%** | |
| **Grand Total** | | **166** | **65** | **$85,416** | **144** | **60** | **80,397** | **0.42** | **4** | **2** | **$4,339** | **50.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Marsha Liles

Role: LBE

LBE UPN:1279773

KEENE & ASSOCIATES INSURANCE AGENCY, INC.

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SMITHFIELD NC 27577

Phone/Email: 9199341262 LYNN@KEENEASSOCIATES.NET

NC

# Agency Scorecard

## 1280088, THE GAVIGAN AGENCY LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $32,542 | 44.9% | 18.7% | $28,340 | 28.2% | $13,703 | 6.4% | 21 | 31.3% | 95.5% | $1,550 | 10/31/2025 |
| | Marine | $4,868 | 0.2% | 17.8% | $1,804 | -13.0% | $0 | 0.0% | 4 | 0.0% | 100.0% | $1,217 | 10/31/2025 |
| | Mobile Home | $31,843 | 7.3% | 34.8% | $25,210 | 5.0% | $0 | 0.0% | 15 | 0.0% | 100.0% | $2,123 | 10/31/2025 |
| | Motor Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $2,810 | 5.0% | 35.2% | $2,810 | 5.0% | $770 | 2.5% | 3 | 0.0% | 100.0% | $937 | 10/31/2025 |
| | **Total** | **$72,063** | **20.7%** | **26.7%** | **$58,164** | **14.4%** | **$14,473** | **6.2%** | **43** | **13.2%** | **97.7%** | **$1,676** | |
| **Total** | **Total** | **$72,063** | **20.7%** | **26.7%** | **$58,164** | **14.4%** | **$14,473** | **6.2%** | **43** | **13.2%** | **97.7%** | **$1,676** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | 17 | 6 | $6,189 | 16 | 4 | $4,552 | 0.25 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 9 | 0 | $0 | 9 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **26** | **6** | **$6,189** | **25** | **4** | **4,552** | **0.16** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **26** | **6** | **$6,189** | **25** | **4** | **4,552** | **0.16** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1280088

THE GAVIGAN AGENCY LLC

Address: 2002 S GLENBURNIE RD STE 5C

NEW BERN NC 28562

Phone/Email: 2526362999 JON@GAVIGANINSURANCE.COM

NC

# Agency Scorecard

## 1280100, THE GAVIGAN AGENCY LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $39,610 | 43.6% | 36.2% | $36,926 | 50.8% | $2,547 | 68.9% | 24 | 33.3% | 85.7% | $1,650 | 10/31/2025 |
| | Marine | $1,838 | -9.2% | 11.2% | $1,838 | -9.2% | $0 | 0.0% | 3 | 0.0% | 100.0% | $613 | 10/31/2025 |
| | Mobile Home | $7,066 | 7.1% | 35.7% | $5,504 | -16.6% | $0 | 0.0% | 5 | 0.0% | 100.0% | $1,413 | 10/31/2025 |
| | Off-Road Veh | $169 | 9999.9% | 13.7% | $169 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $169 | 10/31/2025 |
| | Rental M.H. | $374 | 2.2% | 35.7% | $374 | 154.4% | $0 | 0.0% | 1 | 0.0% | 100.0% | $374 | 10/31/2025 |
| | **Total** | **$49,057** | **34.1%** | **34.9%** | **$44,811** | **34.7%** | **$2,547** | **68.9%** | **34** | **25.9%** | **89.5%** | **$1,443** | |
| **Total** | **Total** | **$49,057** | **34.1%** | **34.9%** | **$44,811** | **34.7%** | **$2,547** | **68.9%** | **34** | **25.9%** | **89.5%** | **$1,443** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | 27 | 10 | $21,890 | 22 | 10 | $21,890 | 0.45 | 1 | 1 | $1,495 | 100.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 1 | 1 | $169 | 1 | 1 | $169 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **28** | **11** | **$22,059** | **23** | **11** | **22,059** | **0.48** | **1** | **1** | **$1,495** | **100.0%** | |
| **Grand Total** | | **28** | **11** | **$22,059** | **23** | **11** | **22,059** | **0.48** | **1** | **1** | **$1,495** | **100.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: SUB

LBE UPN:1280088

1280088

THE GAVIGAN AGENCY LLC

Address: 2424 CHARLES BLVD

GREENVILLE NC 27858

Phone/Email: 2527561400 JON@GAVIGANINSURANCE.COM

NC

# Agency Scorecard

## 1280752, JONES-BYRD INSURANCE GROUP, LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $57,482 | -2.0% | 23.4% | $48,193 | 0.8% | $2,925 | -48.2% | 48 | -2.0% | 81.4% | $1,198 | 10/31/2025 |
| | Marine | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $122,525 | -13.6% | 25.9% | $112,324 | -16.9% | $11,969 | 4.3% | 79 | -14.1% | 82.3% | $1,551 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Off-Road Veh | $10 | -90.7% | 5826.7% | $10 | -90.7% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $5,465 | -53.6% | 116.2% | $4,847 | -53.1% | ($595) | -151.1% | 12 | -20.0% | 80.0% | $455 | 10/31/2025 |
| | Travel Trailer | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$185,482** | **-12.6%** | **31.7%** | **$165,374** | **-14.5%** | **$14,299** | **-21.8%** | **139** | **-11.5%** | **81.3%** | **$1,334** | |
| **Total** | **Total** | **$185,482** | **-12.6%** | **31.7%** | **$165,374** | **-14.5%** | **$14,299** | **-21.8%** | **139** | **-11.5%** | **81.3%** | **$1,334** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | 16 | 10 | $18,183 | 14 | 8 | $16,015 | 0.57 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 15 | 4 | $3,074 | 13 | 3 | $1,601 | 0.23 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **34** | **14** | **$21,257** | **30** | **11** | **17,616** | **0.37** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **34** | **14** | **$21,257** | **30** | **11** | **17,616** | **0.37** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner Portfolio Owner: Digital Segment JONES-BYRD INSURANCE GROUP, LLC

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100 Role: SUB Address: 97 E MAIN ST

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100 LBE UPN:1279617 COATS NC 27521

Annual Average Premium = This Yr R12 NWP / PIF 1279617 Phone/Email: 9108973100 RJONES@JONESBYRDINSURANCE.COM

NC

# Agency Scorecard

## 1281264, CLAY ANDERS INS SERVICES

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $96,986 | 63.5% | 17.2% | $81,832 | 67.4% | $13,827 | 200.0% | 78 | 21.9% | 91.8% | $1,243 | 10/31/2025 |
| | Marine | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $75,194 | 4.1% | 32.7% | $65,800 | 4.9% | $4,361 | -21.5% | 73 | -1.4% | 91.3% | $1,030 | 10/31/2025 |
| | Off-Road Veh | $651 | 51.0% | 2.0% | $651 | 51.0% | $501 | 16.2% | 4 | 300.0% | 100.0% | $163 | 10/31/2025 |
| | Rental M.H. | $10,979 | 0.1% | 18.6% | $8,511 | -6.0% | $2,326 | 2.6% | 15 | -6.3% | 93.8% | $732 | 10/31/2025 |
| | Travel Trailer | $435 | -801.6% | 7.2% | $435 | -801.6% | $167 | 9999.9% | 2 | 100.0% | 100.0% | $218 | 10/31/2025 |
| | **Total** | **$184,245** | **29.0%** | **24.6%** | **$157,229** | **29.9%** | **$21,182** | **64.6%** | **172** | **10.3%** | **92.0%** | **$1,071** | |
| **Total** | **Total** | **$184,245** | **29.0%** | **24.6%** | **$157,229** | **29.9%** | **$21,182** | **64.6%** | **172** | **10.3%** | **92.0%** | **$1,071** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | 35 | 21 | $43,348 | 27 | 16 | $38,355 | 0.59 | 2 | 1 | $5,440 | 50.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 22 | 6 | $4,019 | 20 | 6 | $4,019 | 0.30 | 1 | 1 | $705 | 100.0% | 10/31/2025 |
| | Off-Road Veh | 5 | 3 | $228 | 5 | 3 | $228 | 0.60 | 0 | 1 | $78 | 0.0% | 10/31/2025 |
| | Rental M.H. | 4 | 0 | $0 | 4 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 3 | 1 | $167 | 3 | 1 | $167 | 0.33 | 1 | 1 | $167 | 100.0% | 10/31/2025 |
| | **Total** | **69** | **31** | **$47,762** | **59** | **26** | **42,769** | **0.44** | **4** | **4** | **$6,390** | **100.0%** | |
| **Grand Total** | | **69** | **31** | **$47,762** | **59** | **26** | **42,769** | **0.44** | **4** | **4** | **$6,390** | **100.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Wade Baccich

Role: LBE

LBE UPN:1281264

CLAY ANDERS INS SERVICES

Address: 521 HARPER AVE SW

LENOIR NC 28645

Phone/Email: 8287585551 STERLINGANDERS@CLAYANDERSINSURANCE.COM

NC

# Agency Scorecard

## 1281358, CLAY ANDERS INS SERVICES INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $21,896 | 49.4% | 525.1% | $19,219 | 53.1% | ($2,048) | -266.1% | 20 | 33.3% | 80.0% | $1,095 | 10/31/2025 |
| | Mobile Home | $40,378 | 8.8% | 18.7% | $39,155 | 18.5% | $2,216 | -5.6% | 33 | 6.5% | 86.8% | $1,224 | 10/31/2025 |
| | Motor Home | $1,100 | 0.5% | 13.8% | $1,100 | 0.5% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,100 | 10/31/2025 |
| | Off-Road Veh | $75 | 141.9% | 3.0% | $75 | 141.9% | $0 | 0.0% | 1 | 0.0% | 100.0% | $75 | 10/31/2025 |
| | Rental M.H. | $3,532 | -39.5% | 17.6% | $3,240 | -41.9% | $0 | 0.0% | 3 | -40.0% | 60.0% | $1,177 | 10/31/2025 |
| | **Total** | **$66,981** | **14.1%** | **159.5%** | **$62,789** | **20.1%** | **$168** | **-95.3%** | **58** | **9.4%** | **82.9%** | **$1,155** | |
| **Total** | **Total** | **$66,981** | **14.1%** | **159.5%** | **$62,789** | **20.1%** | **$168** | **-95.3%** | **58** | **9.4%** | **82.9%** | **$1,155** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | 19 | 10 | $15,385 | 18 | 10 | $15,385 | 0.56 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 17 | 7 | $9,452 | 15 | 7 | $9,452 | 0.47 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 3 | 0 | $0 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **39** | **17** | **$24,837** | **36** | **17** | **24,837** | **0.47** | **2** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **39** | **17** | **$24,837** | **36** | **17** | **24,837** | **0.47** | **2** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: SUB

LBE UPN:1281264

1281264

CLAY ANDERS INS SERVICES INC

Address: 1823 DAVIE AVE

STATESVILLE NC 28677

Phone/Email: 7048724674 STERLINGANDERS@CLAYANDERSINSURANCE.COM

NC

# Agency Scorecard

## 1282493, NEIL BROCK & ASSOCIATES, INC.

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $48,598 | 2.8% | 16.1% | $44,587 | 0.9% | $0 | 0.0% | 34 | -5.6% | 91.9% | $1,429 | 10/31/2025 |
| | Marine | $268 | 0.4% | 17.1% | $268 | 0.4% | $0 | 0.0% | 1 | 0.0% | 100.0% | $268 | 10/31/2025 |
| | Mobile Home | $51,994 | 10.7% | 22.9% | $44,082 | 4.3% | ($287) | 0.0% | 38 | 8.6% | 88.4% | $1,368 | 10/31/2025 |
| | Motorcycle | $0 | -100.0% | -7.5% | $0 | -100.0% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Off-Road Veh | $84 | 0.0% | 4.1% | $84 | 0.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $84 | 10/31/2025 |
| | Rental M.H. | $10,093 | 82.0% | 20.2% | $7,864 | 41.8% | ($255) | 0.0% | 7 | 0.0% | 87.5% | $1,442 | 10/31/2025 |
| | Travel Trailer | $1,342 | 9999.9% | 17.1% | $658 | 9999.9% | $658 | 9999.9% | 1 | 9999.9% | 100.0% | $1,342 | 10/31/2025 |
| | **Total** | **$112,379** | **12.0%** | **19.6%** | **$97,543** | **5.4%** | **$116** | **9999.9%** | **82** | **1.2%** | **89.1%** | **$1,370** | |
| **Total** | **Total** | **$112,379** | **12.0%** | **19.6%** | **$97,543** | **5.4%** | **$116** | **9999.9%** | **82** | **1.2%** | **89.1%** | **$1,370** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **1** | **0** | **$0** | **1** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 11 | 1 | $1,185 | 8 | 1 | $1,185 | 0.13 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 19 | 8 | $8,463 | 15 | 6 | $8,158 | 0.40 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 1 | $2,229 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 1 | 1 | $684 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **33** | **11** | **$12,561** | **25** | **7** | **9,343** | **0.28** | **1** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **34** | **11** | **$12,561** | **26** | **7** | **9,343** | **0.27** | **1** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Wade Baccich

Role: LBE

LBE UPN:1282493

NEIL BROCK & ASSOCIATES, INC.

Address: 4702 S NEW HOPE RD

BELMONT NC 28012

Phone/Email: 7048296868 NBROCK@NEILBROCKAGENCY.COM

# Agency Scorecard

**NC**

## 1282498, NEIL BROCK & ASSOCIATES, INC.

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $2,690 | 16.7% | 13.0% | $2,690 | 16.7% | $0 | 0.0% | 3 | 0.0% | 100.0% | $897 | 10/31/2025 |
| | Mobile Home | $29,592 | 5.7% | 18.3% | $24,995 | -1.5% | $0 | -100.0% | 22 | -4.3% | 95.7% | $1,345 | 10/31/2025 |
| | Rental M.H. | $103 | -65.3% | 14.0% | $103 | -65.3% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$32,385** | **5.9%** | **17.9%** | **$27,788** | **-0.7%** | **$0** | **-100.0%** | **25** | **-7.4%** | **92.6%** | **$1,295** | |
| **Total** | **Total** | **$32,385** | **5.9%** | **17.9%** | **$27,788** | **-0.7%** | **$0** | **-100.0%** | **25** | **-7.4%** | **92.6%** | **$1,295** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: SUB

LBE UPN:1282493

1282493

NEIL BROCK & ASSOCIATES, INC.

Address: 114 E DIXON BLVD

SHELBY NC 28152

Phone/Email: 7044842680 NBROCK@NEILBROCKAGENCY.COM

NC

# Agency Scorecard

## 1289199, DARDEN INSURANCE AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $49,496 | 9.8% | 11.9% | $35,163 | -5.5% | $3,402 | -25.1% | 43 | 7.5% | 87.8% | $1,151 | 10/31/2025 |
| | Marine | $4,358 | -5.9% | 22.2% | $4,143 | 10.5% | $207 | -32.6% | 11 | -8.3% | 91.7% | $396 | 10/31/2025 |
| | Mobile Home | ($406) | -106.0% | 25.0% | $663 | -86.0% | $0 | 0.0% | 3 | -40.0% | 60.0% | ($135) | 10/31/2025 |
| | Off-Road Veh | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $267 | 8.1% | 36.6% | $0 | -100.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $267 | 10/31/2025 |
| | **Total** | **$53,715** | **-5.2%** | **13.7%** | **$39,969** | **-13.0%** | **$3,609** | **-25.5%** | **58** | **0.0%** | **86.6%** | **$926** | |
| **Total** | **Total** | **$53,715** | **-5.2%** | **13.7%** | **$39,969** | **-13.0%** | **$3,609** | **-25.5%** | **58** | **0.0%** | **86.6%** | **$926** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | 25 | 9 | $8,809 | 20 | 5 | $5,268 | 0.25 | 2 | 1 | $1,013 | 50.0% | 10/31/2025 |
| | Marine | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 3 | 0 | $0 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **29** | **9** | **$8,809** | **24** | **5** | **5,268** | **0.21** | **2** | **1** | **$1,013** | **50.0%** | |
| **Grand Total** | | **29** | **9** | **$8,809** | **24** | **5** | **5,268** | **0.21** | **2** | **1** | **$1,013** | **50.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1289199

DARDEN INSURANCE AGENCY INC

Address: 17230 US HIGHWAY 17 STE 120

HAMPSTEAD NC 28443

Phone/Email: 9102703017 BDVELTHOVEN@DARDENAGENCYNC.COM

NC

# Agency Scorecard

## 1289863, ARVEY INSURANCE AGENCY, INC.

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $25,614 | 72.1% | 13.6% | $15,158 | 26.7% | $4,529 | 9999.9% | 15 | 25.0% | 78.9% | $1,708 | 10/31/2025 |
| | Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $22,035 | 17.4% | 17.6% | $19,556 | 5.6% | $2,024 | 104.2% | 15 | 0.0% | 93.8% | $1,469 | 10/31/2025 |
| | Motor Home | $6,314 | 9999.9% | 23.8% | $6,314 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $6,314 | 10/31/2025 |
| | Rental M.H. | $6,963 | 45.7% | 17.3% | $6,963 | 45.7% | $0 | 0.0% | 5 | 25.0% | 125.0% | $1,393 | 10/31/2025 |
| | Travel Trailer | $364 | -59.4% | 11.4% | $364 | -59.4% | $0 | 0.0% | 1 | -50.0% | 50.0% | $364 | 10/31/2025 |
| | **Total** | **$61,290** | **55.9%** | **15.8%** | **$48,355** | **33.7%** | **$6,553** | **561.3%** | **37** | **12.1%** | **88.1%** | **$1,656** | |
| **Total** | **Total** | **$61,290** | **55.9%** | **15.8%** | **$48,355** | **33.7%** | **$6,553** | **561.3%** | **37** | **12.1%** | **88.1%** | **$1,656** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 11 | 7 | $11,922 | 9 | 5 | $7,654 | 0.56 | 2 | 1 | $2,211 | 50.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 3 | 1 | $1,287 | 3 | 1 | $1,287 | 0.33 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 2 | 1 | $6,314 | 2 | 1 | $6,314 | 0.50 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **18** | **9** | **$19,523** | **16** | **7** | **15,255** | **0.44** | **3** | **1** | **$2,211** | **33.3%** | |
| **Grand Total** | | **18** | **9** | **$19,523** | **16** | **7** | **15,255** | **0.44** | **3** | **1** | **$2,211** | **33.3%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Kim Litman

Role: LBE

LBE UPN:1289863

ARVEY INSURANCE AGENCY, INC.

Address: 1506 SPARTANBURG HWY STE 100

HENDERSONVILLE NC 28792

Phone/Email: 8286939990 GREGG@ARVEYINSURANCE.COM

NC

# Agency Scorecard

## 1357074, BENTLEY AGENCY LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $72,095 | 35.8% | 13.8% | $65,460 | 28.8% | $5,219 | 52.2% | 41 | 32.3% | 97.6% | $1,758 | 10/31/2025 |
| | Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Marine | $0 | 0.0% | 999.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $88,799 | -3.1% | 21.0% | $71,096 | -10.3% | $2,577 | -56.6% | 67 | -2.9% | 90.5% | $1,325 | 10/31/2025 |
| | Motor Home | $202 | -52.5% | 37508.0% | $0 | -100.0% | $0 | 0.0% | 1 | -50.0% | 50.0% | $202 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Off-Road Veh | ($2) | -102.9% | -8.8% | ($2) | -102.9% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $10,925 | 11.1% | 17.9% | $9,064 | -4.8% | $1,944 | 9999.9% | 10 | -16.7% | 76.9% | $1,093 | 10/31/2025 |
| | Travel Trailer | $1,931 | -46.5% | 10.4% | $1,896 | -36.4% | $0 | -100.0% | 4 | -33.3% | 57.1% | $483 | 10/31/2025 |
| | **Total** | **$173,950** | **9.7%** | **100.5%** | **$147,514** | **3.2%** | **$9,740** | **0.0%** | **123** | **1.7%** | **88.5%** | **$1,414** | |
| **Total** | **Total** | **$173,950** | **9.7%** | **100.5%** | **$147,514** | **3.2%** | **$9,740** | **0.0%** | **123** | **1.7%** | **88.5%** | **$1,414** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | 23 | 11 | $14,203 | 19 | 9 | $9,900 | 0.47 | 0 | 1 | $1,101 | 0.0% | 10/31/2025 |
| | Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 17 | 5 | $4,227 | 15 | 3 | $2,671 | 0.20 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 4 | 1 | $2,123 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 3 | 1 | $492 | 3 | 1 | $492 | 0.33 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **49** | **18** | **$21,045** | **42** | **13** | **13,063** | **0.31** | **1** | **1** | **$1,101** | **100.0%** | |
| **Grand Total** | | **49** | **18** | **$21,045** | **42** | **13** | **13,063** | **0.31** | **1** | **1** | **$1,101** | **100.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Kim Litman

Role: LBE

LBE UPN:1357074

BENTLEY AGENCY LLC

Address: 1435 N MAIN ST

CHINA GROVE NC 28023

Phone/Email: 7048579512 JASON@BENTLEYAGENCY.COM

NC

# Agency Scorecard

## 1361354, COLLETTE,ROY W

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $13,726 | -13.2% | 13.7% | $11,072 | -2.4% | $1,557 | 54.0% | 16 | 6.7% | 88.9% | $858 | 10/31/2025 |
| | Mobile Home | $5,853 | -12.0% | 16.7% | $4,580 | -16.9% | $415 | 1.5% | 6 | -14.3% | 85.7% | $976 | 10/31/2025 |
| | Rental M.H. | $1,977 | 3.5% | 18.3% | $1,609 | 2.7% | $0 | 0.0% | 3 | 0.0% | 100.0% | $659 | 10/31/2025 |
| | **Total** | **$21,556** | **-11.6%** | **14.9%** | **$17,261** | **-6.3%** | **$1,972** | **38.9%** | **25** | **0.0%** | **89.3%** | **$862** | |
| **Total** | **Total** | **$21,556** | **-11.6%** | **14.9%** | **$17,261** | **-6.3%** | **$1,972** | **38.9%** | **25** | **0.0%** | **89.3%** | **$862** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | 7 | 3 | $1,921 | 5 | 2 | $1,138 | 0.40 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **7** | **3** | **$1,921** | **5** | **2** | **1,138** | **0.40** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **7** | **3** | **$1,921** | **5** | **2** | **1,138** | **0.40** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1361354

COLLETTE,ROY W

Address: 1022 HUTTON LN STE 105

HIGH POINT NC 27262

Phone/Email: 3368844343 ROY@COLLETTEINSURANCE.COM

NC

# Agency Scorecard

## 1380975, THE GAVIGAN AGENCY LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $3,398 | 3.1% | 13.1% | $2,181 | -33.8% | $0 | 0.0% | 3 | 0.0% | 100.0% | $1,133 | 10/31/2025 |
| | Marine | $4,379 | 5.0% | 15.3% | $3,961 | -5.0% | $0 | 0.0% | 10 | 0.0% | 100.0% | $438 | 10/31/2025 |
| | Mobile Home | $19,757 | -5.2% | 48.1% | $12,218 | -14.0% | $938 | -171.8% | 14 | -12.5% | 87.5% | $1,411 | 10/31/2025 |
| | Motor Home | ($2,595) | -190.8% | -55.0% | $0 | -100.0% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $590 | -1.8% | 3.7% | $590 | -1.8% | $0 | 0.0% | 1 | 0.0% | 100.0% | $590 | 10/31/2025 |
| | Off-Road Veh | $80 | 6.7% | 3.4% | $80 | 6.7% | $0 | 0.0% | 1 | 0.0% | 100.0% | $80 | 10/31/2025 |
| | Rental M.H. | $8,517 | 15.4% | 34.7% | $8,517 | 15.4% | $0 | 0.0% | 6 | 0.0% | 100.0% | $1,420 | 10/31/2025 |
| | **Total** | **$34,126** | **-13.0%** | **36.0%** | **$27,547** | **-15.5%** | **$938** | **-171.8%** | **35** | **-7.9%** | **92.1%** | **$975** | |
| **Total** | **Total** | **$34,126** | **-13.0%** | **36.0%** | **$27,547** | **-15.5%** | **$938** | **-171.8%** | **35** | **-7.9%** | **92.1%** | **$975** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | 17 | 0 | $0 | 14 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 3 | 0 | $0 | 3 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 17 | 0 | $0 | 14 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **40** | **0** | **$0** | **34** | **0** | **0** | **0.00** | **2** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **40** | **0** | **$0** | **34** | **0** | **0** | **0.00** | **2** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: SUB

LBE UPN:1280088

1280088

THE GAVIGAN AGENCY LLC

Address: 8164 MAIN ST

VANCEBORO NC 28586

Phone/Email: 2522441381 VANCEBORO@GAVIGANINSURANCE.COM

NH

# Agency Scorecard

## 1277852, AVERY INSURANCE AGENCY

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $216,392 | 63.2% | 9.4% | $178,507 | 65.5% | $18,939 | 60.9% | 142 | 36.5% | 89.3% | $1,524 | 10/31/2025 |
| | Home | $11,951 | -22.0% | 6.7% | $11,951 | -2.8% | $2,370 | 2.1% | 8 | -11.1% | 88.9% | $1,494 | 10/31/2025 |
| | Marine | $21 | 9999.9% | 0.0% | $21 | 9999.9% | $21 | 9999.9% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $45,793 | 26.2% | 8.8% | $37,356 | 22.3% | $4,020 | 293.3% | 48 | 17.1% | 94.1% | $954 | 10/31/2025 |
| | Motorcycle | $71 | -94.5% | 0.8% | $0 | -100.0% | $0 | 0.0% | 1 | -50.0% | 50.0% | $71 | 10/31/2025 |
| | Off-Road Veh | $97 | 9999.9% | 14.9% | $97 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $97 | 10/31/2025 |
| | Rental M.H. | $6,371 | 34.4% | 10.6% | $5,709 | 41.1% | $0 | -100.0% | 5 | 25.0% | 100.0% | $1,274 | 10/31/2025 |
| | Travel Trailer | $506 | -21.8% | 0.4% | $231 | -32.3% | $0 | 0.0% | 2 | -33.3% | 50.0% | $253 | 10/31/2025 |
| | **Total** | **$281,202** | **47.3%** | **9.1%** | **$233,872** | **49.6%** | **$25,350** | **52.7%** | **207** | **27.0%** | **89.2%** | **$1,358** | |
| **Total** | **Total** | **$281,202** | **47.3%** | **9.1%** | **$233,872** | **49.6%** | **$25,350** | **52.7%** | **207** | **27.0%** | **89.2%** | **$1,358** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 94 | 55 | $102,775 | 82 | 46 | $82,166 | 0.56 | 4 | 4 | $6,636 | 100.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 1 | 1 | $206 | 1 | 1 | $206 | 1.00 | 1 | 1 | $206 | 100.0% | 10/31/2025 |
| | Mobile Home | 15 | 10 | $11,814 | 14 | 9 | $10,952 | 0.64 | 3 | 2 | $2,022 | 66.7% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 2 | 1 | $97 | 2 | 1 | $97 | 0.50 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 1 | $662 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 1 | 1 | $220 | 1 | 1 | $220 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **114** | **69** | **$115,774** | **100** | **58** | **93,641** | **0.58** | **9** | **7** | **$8,864** | **77.8%** | |
| **Grand Total** | | **114** | **69** | **$115,774** | **100** | **58** | **93,641** | **0.58** | **9** | **7** | **$8,864** | **77.8%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1277852

AVERY INSURANCE AGENCY

Address: 3 PARSONS AVE

CLAREMONT NH 03743

Phone/Email: 6035430156 DON@AVERYNH.COM

# Agency Scorecard

**NH**

## 1278109, J BERGERON AGENCY LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $6,031 | -42.4% | 171.3% | $4,242 | -45.0% | $0 | -100.0% | 2 | -33.3% | 50.0% | $3,016 | 10/31/2025 |
| | **Total** | **$6,031** | **-42.4%** | **171.3%** | **$4,242** | **-45.0%** | **$0** | **-100.0%** | **2** | **-33.3%** | **50.0%** | **$3,016** | |
| Foremost Choice | Dwelling Fire | $3,330 | 16.4% | 7.0% | $3,330 | 16.4% | $0 | 0.0% | 3 | 0.0% | 100.0% | $1,110 | 10/31/2025 |
| | Home | $7,960 | 3.4% | 7.1% | $7,960 | 3.4% | $3,123 | 9999.9% | 4 | 0.0% | 100.0% | $1,990 | 10/31/2025 |
| | Mobile Home | $36,342 | -1.6% | 74.6% | $30,318 | 1.2% | $1,979 | -28.7% | 31 | -6.1% | 88.6% | $1,172 | 10/31/2025 |
| | Motorcycle | $1,398 | 599.0% | 9.6% | $1,398 | 599.0% | $0 | 0.0% | 3 | 200.0% | 75.0% | $466 | 10/31/2025 |
| | Off-Road Veh | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Travel Trailer | $699 | -4.0% | 1.5% | $699 | -4.0% | $0 | 0.0% | 2 | 0.0% | 100.0% | $350 | 10/31/2025 |
| | **Total** | **$49,729** | **2.7%** | **57.9%** | **$43,705** | **5.5%** | **$5,102** | **83.8%** | **43** | **0.0%** | **89.6%** | **$1,156** | |
| **Total** | **Total** | **$55,760** | **-5.3%** | **74.4%** | **$47,947** | **-2.4%** | **$5,102** | **-1.1%** | **45** | **-2.2%** | **86.5%** | **$1,239** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 16 | 1 | $1,263 | 12 | 1 | $1,263 | 0.08 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **16** | **1** | **$1,263** | **12** | **1** | **1,263** | **0.08** | **2** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 5 | 0 | $0 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 8 | 2 | $2,627 | 6 | 2 | $2,627 | 0.33 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 3 | 3 | $2,962 | 3 | 3 | $2,962 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **18** | **5** | **$5,589** | **14** | **5** | **5,589** | **0.36** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **34** | **6** | **$6,852** | **26** | **6** | **6,852** | **0.23** | **2** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Erica Carey

Role: LBE

LBE UPN:1278109

J BERGERON AGENCY LLC

Address: 361 MAIN ST

NASHUA NH 03060

Phone/Email: 6038817708 BERGERJ2@BERGERONAGENCY.COM

# Agency Scorecard

**NV**

## 1279758, BRYAN ZANE TERRY & ASSOCIATES LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $9,020 | 2.2% | 5.0% | $6,380 | 1.6% | $0 | 0.0% | 7 | 0.0% | 77.8% | $1,289 | 10/31/2025 |
| | Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $387 | 4.6% | 3.4% | $387 | 4.6% | $0 | 0.0% | 1 | 0.0% | 100.0% | $387 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Travel Trailer | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$9,407** | **2.3%** | **4.9%** | **$6,767** | **1.7%** | **$0** | **0.0%** | **8** | **0.0%** | **80.0%** | **$1,176** | |
| **Total** | **Total** | **$9,407** | **2.3%** | **4.9%** | **$6,767** | **1.7%** | **$0** | **0.0%** | **8** | **0.0%** | **80.0%** | **$1,176** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 16 | 2 | $3,953 | 11 | 2 | $3,953 | 0.18 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 7 | 0 | $0 | 5 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **23** | **2** | **$3,953** | **16** | **2** | **3,953** | **0.13** | **1** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **23** | **2** | **$3,953** | **16** | **2** | **3,953** | **0.13** | **1** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1279758

BRYAN ZANE TERRY & ASSOCIATES LLC

Address: 7445 W AZURE DR STE 110

LAS VEGAS NV 89130

Phone/Email: 7026442500 BRYAN@BRYANZANETERRY.COM

# Agency Scorecard

**NV**

## 1279767, FORAKER, LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $7,807 | 69.8% | 0.7% | $7,428 | 61.6% | $2,511 | 611.3% | 4 | 0.0% | 66.7% | $1,952 | 10/31/2025 |
| | **Total** | **$7,807** | **69.8%** | **0.7%** | **$7,428** | **61.6%** | **$2,511** | **611.3%** | **4** | **0.0%** | **66.7%** | **$1,952** | |
| Foremost Choice | Dwelling Fire | $6,819 | -50.3% | 0.4% | $5,730 | -46.3% | $0 | -100.0% | 9 | -30.8% | 64.3% | $758 | 10/31/2025 |
| | Home | $261 | 0.4% | 0.5% | $261 | 0.4% | $0 | 0.0% | 1 | 0.0% | 100.0% | $261 | 10/31/2025 |
| | Mobile Home | $27,038 | 2.1% | 10.5% | $23,708 | 1.3% | $1,488 | -2.2% | 20 | 0.0% | 100.0% | $1,352 | 10/31/2025 |
| | Off-Road Veh | $254 | -18.6% | 2.0% | $254 | -18.6% | $254 | -18.6% | 1 | 0.0% | 100.0% | $254 | 10/31/2025 |
| | Rental M.H. | $2,693 | 7.2% | 10.6% | $2,397 | 7.2% | $0 | 0.0% | 5 | 0.0% | 100.0% | $539 | 10/31/2025 |
| | **Total** | **$37,065** | **-14.3%** | **7.8%** | **$32,350** | **-12.3%** | **$1,742** | **-48.4%** | **36** | **-10.0%** | **87.8%** | **$1,030** | |
| **Total** | **Total** | **$44,872** | **-6.3%** | **6.8%** | **$39,778** | **-4.1%** | **$4,253** | **14.1%** | **40** | **-9.1%** | **85.1%** | **$1,122** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 12 | 2 | $3,341 | 10 | 1 | $2,132 | 0.10 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **13** | **2** | **$3,341** | **11** | **1** | **2,132** | **0.09** | **1** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 2 | 1 | $1,351 | 2 | 1 | $1,351 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 3 | 0 | $0 | 3 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **6** | **1** | **$1,351** | **6** | **1** | **1,351** | **0.17** | **1** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **19** | **3** | **$4,692** | **17** | **2** | **3,483** | **0.12** | **2** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Grant Sager

Role: LBE

LBE UPN:1279767

FORAKER, LLC

Address: 9960 W CHEYENNE AVE STE 240

LAS VEGAS NV 89129

Phone/Email: 7023608333 TAMMIS@MTN-PACIFIC.COM

NV

# Agency Scorecard

## 1279828, MOUNTAIN PACIFIC INSURANCE SERVICES

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $26,120 | 44.6% | 13.8% | $16,203 | 29.4% | $3,050 | -9.7% | 17 | -5.6% | 94.4% | $1,536 | 10/31/2025 |
| | Home | $12,659 | 33.9% | 447.7% | $12,659 | 33.9% | $0 | 0.0% | 3 | 0.0% | 100.0% | $4,220 | 10/31/2025 |
| | Mobile Home | $21,515 | -1.9% | 121.0% | $17,013 | -3.5% | $3,276 | 1.6% | 19 | -9.5% | 90.5% | $1,132 | 10/31/2025 |
| | Rental M.H. | $3,106 | 4.2% | 12.8% | $3,106 | 4.2% | $0 | 0.0% | 4 | -20.0% | 80.0% | $777 | 10/31/2025 |
| | Travel Trailer | $596 | -2.5% | 8.5% | $596 | -2.5% | $188 | -2.1% | 3 | 0.0% | 100.0% | $199 | 10/31/2025 |
| | **Total** | **$63,996** | **20.7%** | **128.6%** | **$49,577** | **14.8%** | **$6,514** | **-4.1%** | **46** | **-8.0%** | **92.0%** | **$1,391** | |
| **Total** | **Total** | **$63,996** | **20.7%** | **128.6%** | **$49,577** | **14.8%** | **$6,514** | **-4.1%** | **46** | **-8.0%** | **92.0%** | **$1,391** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **1** | **0** | **$0** | **1** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **1** | **0** | **$0** | **1** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Grant Sager

Role: SUB

LBE UPN:1279767

1279767

MOUNTAIN PACIFIC INSURANCE SERVICES

Address: 7040 LAREDO ST STE H

LAS VEGAS NV 89117

Phone/Email: 7023608333 TAMMIS@MTN-PACIFIC.COM

NV

# Agency Scorecard

## 1286609, TERRY,BRYAN

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **-100.0%** | **0.0%** | **$0** | **-100.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| **Total** | **Total** | **$0** | **-100.0%** | **0.0%** | **$0** | **-100.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **1** | **0** | **$0** | **1** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **1** | **0** | **$0** | **1** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: SUB

LBE UPN:1279758

1279758

TERRY,BRYAN

Address: 7445 W AZURE DR STE 110

LAS VEGAS NV 89130

Phone/Email: 7026442500 BRYAN@BRYANZANETERRY.COM

# Agency Scorecard

**NV**

## 1289240, SINES INSURANCE AGENCY LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $31,304 | 85.5% | 0.8% | $19,673 | 38.4% | ($392) | -114.6% | 5 | -37.5% | 45.5% | $6,261 | 10/31/2025 |
| | **Total** | **$31,304** | **85.5%** | **0.8%** | **$19,673** | **38.4%** | **($392)** | **-114.6%** | **5** | **-37.5%** | **45.5%** | **$6,261** | |
| Foremost Choice | Dwelling Fire | $29,734 | 83.3% | -0.5% | $20,336 | 81.4% | $869 | 72.4% | 31 | 19.2% | 88.6% | $959 | 10/31/2025 |
| | Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Marine | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $2,915 | 110.5% | 5.6% | $2,308 | 66.6% | $0 | 0.0% | 3 | 50.0% | 100.0% | $972 | 10/31/2025 |
| | Motor Home | $1,205 | -9.5% | 5.5% | $1,205 | -9.5% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,205 | 10/31/2025 |
| | Motorcycle | $4,425 | -6513.0% | 10.1% | $4,425 | 9999.9% | $0 | 0.0% | 4 | 9999.9% | 100.0% | $1,106 | 10/31/2025 |
| | Off-Road Veh | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Travel Trailer | $682 | -1.4% | 2.1% | $682 | -1.4% | $0 | 0.0% | 1 | 0.0% | 100.0% | $682 | 10/31/2025 |
| | **Total** | **$38,961** | **99.2%** | **0.9%** | **$28,956** | **98.1%** | **$869** | **72.4%** | **40** | **33.3%** | **90.9%** | **$974** | |
| **Total** | **Total** | **$70,265** | **92.8%** | **0.9%** | **$48,629** | **68.6%** | **$477** | **-85.1%** | **45** | **18.4%** | **81.8%** | **$1,561** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 201 | 3 | $9,751 | 169 | 1 | $927 | 0.01 | 19 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **201** | **3** | **$9,751** | **169** | **1** | **927** | **0.01** | **19** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 54 | 9 | $16,068 | 47 | 9 | $16,068 | 0.19 | 2 | 1 | $869 | 50.0% | 10/31/2025 |
| | Home | 14 | 0 | $0 | 11 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 3 | 1 | $1,442 | 2 | 1 | $1,442 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 7 | 4 | $3,828 | 7 | 4 | $3,828 | 0.57 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 3 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **83** | **14** | **$21,338** | **70** | **14** | **21,338** | **0.20** | **2** | **1** | **$869** | **50.0%** | |
| **Grand Total** | | **284** | **17** | **$31,089** | **239** | **15** | **22,265** | **0.06** | **21** | **1** | **$869** | **4.8%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Grant Sager

Role: LBE

LBE UPN:1289240

SINES INSURANCE AGENCY LLC

Address: 140 E HORIZON DR STE E

HENDERSON NV 89015

Phone/Email: 7024308172 WYATT@SINESINSURANCE.COM

# Agency Scorecard

**NV**

## 1289255, SINES,WYATT

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Mobile Home | $2,356 | 2.0% | 10.9% | $2,356 | 2.0% | $2,356 | 2.0% | 1 | 0.0% | 100.0% | $2,356 | 10/31/2025 |
| | **Total** | **$2,356** | **2.0%** | **10.9%** | **$2,356** | **2.0%** | **$2,356** | **2.0%** | **1** | **0.0%** | **100.0%** | **$2,356** | |
| **Total** | **Total** | **$2,356** | **2.0%** | **10.9%** | **$2,356** | **2.0%** | **$2,356** | **2.0%** | **1** | **0.0%** | **100.0%** | **$2,356** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Grant Sager

Role: SUB

LBE UPN:1289240

1289240

SINES,WYATT

Address: 140 E HORIZON DR STE E

HENDERSON NV 89015

Phone/Email: 7024308172 WYATT@SINESINSURANCE.COM

NY

# Agency Scorecard

## 166268, ALL CITY INSURANCE SERVICES INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $17,361 | -20.5% | 309.0% | $18,244 | -16.4% | $0 | -100.0% | 2 | -60.0% | 22.2% | $8,681 | 10/31/2025 |
| | **Total** | **$17,361** | **-20.5%** | **309.0%** | **$18,244** | **-16.4%** | **$0** | **-100.0%** | **2** | **-60.0%** | **22.2%** | **$8,681** | |
| Foremost Choice | Dwelling Fire | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Marine | $1,434 | 9999.9% | 26.9% | $1,434 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $1,434 | 10/31/2025 |
| | Mobile Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$1,434** | **9999.9%** | **26.9%** | **$1,434** | **9999.9%** | **$0** | **0.0%** | **1** | **9999.9%** | **50.0%** | **$1,434** | |
| Farmers | Farmers Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 9/30/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| **Total** | **Total** | **$18,795** | **-13.9%** | **302.7%** | **$19,678** | **-9.9%** | **$0** | **-100.0%** | **3** | **-40.0%** | **27.3%** | **$6,265** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 18 | 4 | $12,196 | 11 | 3 | $10,585 | 0.27 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **18** | **4** | **$12,196** | **11** | **3** | **10,585** | **0.27** | **1** | **0** | **$0** | **0.0%** | |
| Farmers | Farmers Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 9/30/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 9 | 1 | $3,182 | 9 | 1 | $3,182 | 0.11 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 1 | 1 | $1,434 | 1 | 1 | $1,434 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **11** | **2** | **$4,616** | **11** | **2** | **4,616** | **0.18** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **29** | **6** | **$16,812** | **22** | **5** | **15,201** | **0.23** | **1** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Brad Bicksler

Role: LBE

LBE UPN:166268

ALL CITY INSURANCE SERVICES INC

Address: 4421 5TH AVE

BROOKLYN NY 11220

Phone/Email: 7183694545 ALLCITYINS00@GMAIL.COM

# Agency Scorecard

**NY**

## 961112, RODGERS INS AGENCY LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $2,652 | 3.6% | 5.3% | $937 | 3.8% | $0 | 0.0% | 2 | 0.0% | 100.0% | $1,326 | 10/31/2025 |
| | Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Marine | $23 | -91.8% | 13.1% | $23 | -91.8% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $660 | 0.8% | 13.7% | $660 | 0.8% | $0 | 0.0% | 1 | 0.0% | 100.0% | $660 | 10/31/2025 |
| | Motor Home | $1,695 | -12.8% | 10.7% | $414 | -19.9% | $0 | 0.0% | 2 | 0.0% | 100.0% | $848 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$5,030** | **-7.6%** | **8.5%** | **$2,034** | **-13.7%** | **$0** | **0.0%** | **5** | **-16.7%** | **83.3%** | **$1,006** | |
| **Total** | **Total** | **$5,030** | **-7.6%** | **8.5%** | **$2,034** | **-13.7%** | **$0** | **0.0%** | **5** | **-16.7%** | **83.3%** | **$1,006** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **2** | **0** | **$0** | **2** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **6** | **0** | **$0** | **6** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **8** | **0** | **$0** | **8** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:961112

RODGERS INS AGENCY LLC

Address: 3906 SENECA ST LEFT

WEST SENECA NY 14224

Phone/Email: 7165158074 CORINNE@THERODGERSAGENCY.COM

NY

# Agency Scorecard

## 1048109, GMH AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Mobile Home | $10,027 | -17.9% | 18.1% | $9,818 | 6.1% | $0 | -100.0% | 12 | 0.0% | 80.0% | $836 | 10/31/2025 |
| | Motorcycle | $1,090 | 26.3% | 2.0% | $960 | 29.4% | $315 | 9999.9% | 4 | -20.0% | 80.0% | $273 | 10/31/2025 |
| | Rental M.H. | $1,131 | 6.3% | 18.7% | $1,131 | 6.3% | $0 | 0.0% | 3 | 0.0% | 100.0% | $377 | 10/31/2025 |
| | **Total** | **$12,248** | **-13.4%** | **17.1%** | **$11,909** | **7.7%** | **$315** | **-64.6%** | **19** | **-5.0%** | **82.6%** | **$645** | |
| **Total** | **Total** | **$12,248** | **-13.4%** | **17.1%** | **$11,909** | **7.7%** | **$315** | **-64.6%** | **19** | **-5.0%** | **82.6%** | **$645** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Mobile Home | 5 | 3 | $3,221 | 5 | 3 | $3,221 | 0.60 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **5** | **3** | **$3,221** | **5** | **3** | **3,221** | **0.60** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **5** | **3** | **$3,221** | **5** | **3** | **3,221** | **0.60** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1048109

GMH AGENCY INC

Address: 334 E MAIN ST

MIDDLETOWN NY 10940

Phone/Email: 8453430855 INFO@CURABBA.COM

NY

# Agency Scorecard

## 1120087, C QUICK INSURANCE AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $36,272 | 18.5% | 6.2% | $24,974 | -4.4% | $5,105 | 9999.9% | 4 | 0.0% | 50.0% | $9,068 | 10/31/2025 |
| | **Total** | **$36,272** | **18.5%** | **6.2%** | **$24,974** | **-4.4%** | **$5,105** | **9999.9%** | **4** | **0.0%** | **50.0%** | **$9,068** | |
| Foremost Choice | Dwelling Fire | $15,070 | 32.1% | 9.0% | $11,424 | 0.2% | $0 | 0.0% | 6 | 0.0% | 100.0% | $2,512 | 10/31/2025 |
| | Marine | $1,289 | 13.4% | 17.9% | $1,289 | 13.4% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,289 | 10/31/2025 |
| | Mobile Home | $13,039 | -1.1% | 17.6% | $13,039 | -1.1% | $255 | -70.1% | 15 | -6.3% | 88.2% | $869 | 10/31/2025 |
| | Motor Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Off-Road Veh | $265 | 9999.9% | 0.0% | $265 | 9999.9% | $265 | 9999.9% | 1 | 9999.9% | 50.0% | $265 | 10/31/2025 |
| | Rental M.H. | $1,250 | 6.7% | 17.9% | $1,250 | 6.7% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,250 | 10/31/2025 |
| | Travel Trailer | $970 | 438.9% | 16.4% | $970 | 438.9% | $305 | 9999.9% | 3 | 200.0% | 75.0% | $323 | 10/31/2025 |
| | **Total** | **$31,883** | **17.7%** | **13.6%** | **$28,237** | **4.3%** | **$825** | **-3.4%** | **27** | **8.0%** | **87.1%** | **$1,181** | |
| **Total** | **Total** | **$68,155** | **18.1%** | **10.0%** | **$53,211** | **0.0%** | **$5,930** | **594.4%** | **31** | **6.9%** | **79.5%** | **$2,199** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 67 | 4 | $18,980 | 60 | 4 | $18,980 | 0.07 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **67** | **4** | **$18,980** | **60** | **4** | **18,980** | **0.07** | **1** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 3 | 0 | $0 | 3 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 2 | 1 | $787 | 2 | 1 | $787 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 2 | 2 | $906 | 1 | 1 | $265 | 1.00 | 0 | 1 | $265 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 3 | 3 | $1,004 | 3 | 3 | $1,004 | 1.00 | 0 | 1 | $305 | 0.0% | 10/31/2025 |
| | **Total** | **14** | **6** | **$2,697** | **13** | **5** | **2,056** | **0.38** | **3** | **2** | **$570** | **66.7%** | |
| **Grand Total** | | **81** | **10** | **$21,677** | **73** | **9** | **21,036** | **0.12** | **4** | **2** | **$570** | **50.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Tina Yetto

Role: LBE

LBE UPN:1120087

C QUICK INSURANCE AGENCY INC

Address: 13 W MAIN ST

WASHINGTONVILLE NY 10992

Phone/Email: 8454971119 SERVICE@CQUICKINSURANCE.COM

NY

# Agency Scorecard

## 1171833, BOB PUTNAM AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $23,137 | 3145.0% | 10.3% | $23,137 | 3145.0% | $0 | 0.0% | 11 | 1000.0% | 1,100.0% | $2,103 | 10/31/2025 |
| | Mobile Home | $50,030 | 1.0% | 13.5% | $43,545 | 1.7% | $4,476 | 11.6% | 59 | -1.7% | 98.3% | $848 | 10/31/2025 |
| | Motor Home | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $1,326 | -21.3% | 8.9% | $1,506 | -10.6% | $0 | -100.0% | 4 | 0.0% | 80.0% | $332 | 10/31/2025 |
| | Off-Road Veh | $916 | 226.0% | 6.2% | $711 | 901.4% | $205 | 9999.9% | 3 | 50.0% | 75.0% | $305 | 10/31/2025 |
| | Rental M.H. | $437 | -78.8% | 13.2% | $437 | -80.0% | $211 | 1.9% | 4 | -20.0% | 80.0% | $109 | 10/31/2025 |
| | Travel Trailer | $4,941 | -18.7% | 12.3% | $4,941 | -19.5% | $0 | 0.0% | 6 | -14.3% | 85.7% | $824 | 10/31/2025 |
| | **Total** | **$80,787** | **33.9%** | **12.8%** | **$74,277** | **38.6%** | **$4,892** | **5.4%** | **87** | **10.1%** | **106.1%** | **$929** | |
| Farmers | Farmers Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 9/30/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| **Total** | **Total** | **$80,787** | **33.9%** | **12.8%** | **$74,277** | **38.6%** | **$4,892** | **5.4%** | **87** | **10.1%** | **106.1%** | **$929** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Farmers | Farmers Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 9/30/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 4 | 0 | $0 | 4 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 5 | 0 | $0 | 5 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 6 | 1 | $112 | 6 | 1 | $112 | 0.17 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 3 | 2 | $506 | 3 | 2 | $506 | 0.67 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **19** | **3** | **$618** | **19** | **3** | **618** | **0.16** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **19** | **3** | **$618** | **19** | **3** | **618** | **0.16** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1171833

BOB PUTNAM AGENCY INC

Address: 4 DECATUR ST

WORCESTER NY 12197

Phone/Email: 6073971999 INFO@BOBPUTNAMAGENCY.COM

NY

# Agency Scorecard

## 1279555, HERITAGE INSURANCE AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $4,266 | 122.5% | 6.2% | $4,266 | 122.5% | $0 | 0.0% | 1 | 0.0% | 100.0% | $4,266 | 10/31/2025 |
| | **Total** | **$4,266** | **122.5%** | **6.2%** | **$4,266** | **122.5%** | **$0** | **0.0%** | **1** | **0.0%** | **100.0%** | **$4,266** | |
| Foremost Choice | Dwelling Fire | $5,169 | 40.0% | 6.0% | $4,258 | 15.3% | $624 | -64.0% | 4 | 0.0% | 66.7% | $1,292 | 10/31/2025 |
| | Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Marine | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $6,307 | 1.8% | 14.2% | $5,906 | 1.7% | $0 | 0.0% | 9 | 0.0% | 100.0% | $701 | 10/31/2025 |
| | Motorcycle | $219 | 9999.9% | 12.8% | $219 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $219 | 10/31/2025 |
| | Off-Road Veh | $356 | 9999.9% | 14.0% | $178 | 9999.9% | $178 | 9999.9% | 1 | 9999.9% | 100.0% | $356 | 10/31/2025 |
| | Travel Trailer | $899 | 167.6% | 10.3% | $899 | 167.6% | $0 | -100.0% | 2 | 100.0% | 100.0% | $450 | 10/31/2025 |
| | **Total** | **$12,950** | **26.7%** | **10.8%** | **$11,460** | **16.5%** | **$802** | **-48.4%** | **17** | **21.4%** | **89.5%** | **$762** | |
| **Total** | **Total** | **$17,216** | **41.8%** | **9.6%** | **$15,726** | **33.8%** | **$802** | **-48.4%** | **18** | **20.0%** | **90.0%** | **$956** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 108 | 0 | $0 | 105 | 0 | $0 | 0.00 | 14 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **108** | **0** | **$0** | **105** | **0** | **0** | **0.00** | **14** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 7 | 2 | $2,266 | 5 | 1 | $1,355 | 0.20 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 3 | 1 | $219 | 3 | 1 | $219 | 0.33 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 4 | 1 | $178 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 1 | 1 | $597 | 1 | 1 | $597 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **15** | **5** | **$3,260** | **11** | **3** | **2,171** | **0.27** | **1** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **123** | **5** | **$3,260** | **116** | **3** | **2,171** | **0.03** | **15** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Terry Sullivan

Role: LBE

LBE UPN:1279555

HERITAGE INSURANCE AGENCY INC

Address: 5702 S BAY RD

CICERO NY 13039

Phone/Email: 3159255300 ADMIN@HERITAGEINS.AGENCY

NY

# Agency Scorecard

## 1279563, HERITAGE INSURANCE AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $8,654 | 316.9% | 6.2% | $5,641 | 171.7% | $0 | 0.0% | 2 | 100.0% | 100.0% | $4,327 | 10/31/2025 |
| | **Total** | **$8,654** | **316.9%** | **6.2%** | **$5,641** | **171.7%** | **$0** | **0.0%** | **2** | **100.0%** | **100.0%** | **$4,327** | |
| Foremost Choice | Dwelling Fire | $2,077 | 1.5% | 5.7% | $1,177 | 2.5% | $0 | 0.0% | 2 | 0.0% | 100.0% | $1,039 | 10/31/2025 |
| | Mobile Home | $966 | -49.2% | 12.3% | $418 | -69.4% | $0 | 0.0% | 2 | -50.0% | 50.0% | $483 | 10/31/2025 |
| | Off-Road Veh | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $937 | 6.1% | 13.8% | $433 | 4.3% | $0 | 0.0% | 3 | 0.0% | 100.0% | $312 | 10/31/2025 |
| | **Total** | **$3,980** | **-17.6%** | **9.5%** | **$2,028** | **-30.8%** | **$0** | **0.0%** | **7** | **-22.2%** | **77.8%** | **$569** | |
| **Total** | **Total** | **$12,634** | **82.9%** | **7.4%** | **$7,669** | **53.2%** | **$0** | **0.0%** | **9** | **-10.0%** | **81.8%** | **$1,404** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 3 | 1 | $2,709 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **3** | **1** | **$2,709** | **3** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 4 | 0 | $0 | 4 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **4** | **0** | **$0** | **4** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **7** | **1** | **$2,709** | **7** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Terry Sullivan

Role: SUB

LBE UPN:1279555

1279555

HERITAGE INSURANCE AGENCY INC

Address: 8 TAPPAN ST

BALDWINSVILLE NY 13027

Phone/Email: 3156359959 ADMIN@HERITAGEINS.AGENCY

NY

# Agency Scorecard

## 1279565, HERITAGE INSURANCE AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Mobile Home | $473 | 105.7% | 9.4% | $473 | 105.7% | $0 | 0.0% | 1 | 0.0% | 100.0% | $473 | 10/31/2025 |
| | **Total** | **$473** | **105.7%** | **9.4%** | **$473** | **105.7%** | **$0** | **0.0%** | **1** | **0.0%** | **100.0%** | **$473** | |
| **Total** | **Total** | **$473** | **105.7%** | **9.4%** | **$473** | **105.7%** | **$0** | **0.0%** | **1** | **0.0%** | **100.0%** | **$473** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: SUB

LBE UPN:1279555

1279555

HERITAGE INSURANCE AGENCY INC

Address: 1632 W GENESEE ST

SYRACUSE NY 13204

Phone/Email: 3154881760 ADMIN@HERITAGEINS.AGENCY

NY

# Agency Scorecard

## 1280293, MURPHY,MICHAEL O

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $5,060 | -23.2% | 180.7% | $5,060 | -27.8% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$5,060** | **-23.2%** | **180.7%** | **$5,060** | **-27.8%** | **$0** | **0.0%** | **0** | **-100.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $18,417 | 16.9% | 301.6% | $18,417 | 16.9% | $6,279 | 18.0% | 12 | 9.1% | 100.0% | $1,535 | 10/31/2025 |
| | Home | $6,223 | 6.3% | 5.3% | $6,223 | 6.3% | $3,018 | 7.9% | 2 | 0.0% | 100.0% | $3,112 | 10/31/2025 |
| | Mobile Home | $24,027 | -6.8% | 20.5% | $19,479 | 1.4% | $446 | -43.2% | 42 | -8.7% | 87.5% | $572 | 10/31/2025 |
| | Off-Road Veh | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $2,444 | -31.3% | 14.2% | $2,065 | -12.3% | $1,570 | 2.3% | 3 | 0.0% | 100.0% | $815 | 10/31/2025 |
| | **Total** | **$51,111** | **0.3%** | **109.4%** | **$46,184** | **7.0%** | **$11,313** | **8.4%** | **59** | **-4.8%** | **90.8%** | **$866** | |
| **Total** | **Total** | **$56,171** | **-2.4%** | **118.1%** | **$51,244** | **2.1%** | **$11,313** | **8.4%** | **59** | **-6.3%** | **89.4%** | **$952** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 6 | 0 | $0 | 4 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **6** | **0** | **$0** | **4** | **0** | **0** | **0.00** | **1** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 5 | 1 | $1,916 | 5 | 1 | $1,916 | 0.20 | 0 | 1 | $1,916 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 5 | 2 | $1,025 | 5 | 1 | $776 | 0.20 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **12** | **3** | **$2,941** | **12** | **2** | **2,692** | **0.17** | **0** | **1** | **$1,916** | **0.0%** | |
| **Grand Total** | | **18** | **3** | **$2,941** | **16** | **2** | **2,692** | **0.13** | **1** | **1** | **$1,916** | **100.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner

Portfolio Owner: Tina Yetto

Role: LBE

LBE UPN:1280293

MURPHY,MICHAEL O

Address: 195 WASHINGTON ST

SARATOGA SPRINGS NY 12866

Phone/Email: 5185841715 MICHAELOMURPHYAGENCY@GMAIL.COM

NY

# Agency Scorecard

## 1280476, CYNTHIA WOLTZ INSURANCE AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $9,437 | 96.2% | 6.2% | $6,272 | 30.4% | $0 | 0.0% | 1 | 0.0% | 33.3% | $9,437 | 10/31/2025 |
| | **Total** | **$9,437** | **96.2%** | **6.2%** | **$6,272** | **30.4%** | **$0** | **0.0%** | **1** | **0.0%** | **33.3%** | **$9,437** | |
| Foremost Choice | Dwelling Fire | $16,639 | 7.0% | 7.0% | $14,799 | 4.4% | $202 | 1.0% | 16 | 0.0% | 100.0% | $1,040 | 10/31/2025 |
| | Home | $1,054 | 3.6% | 182.1% | $1,054 | 3.6% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,054 | 10/31/2025 |
| | Mobile Home | $13,248 | -6.9% | 125.0% | $11,614 | 3.8% | $1,008 | -1.7% | 22 | -8.3% | 88.0% | $602 | 10/31/2025 |
| | Motor Home | $651 | 15.6% | 12.8% | $651 | 15.6% | $0 | 0.0% | 1 | 0.0% | 100.0% | $651 | 10/31/2025 |
| | Motorcycle | $228 | 9999.9% | 12.6% | $228 | 9999.9% | ($11) | 0.0% | 1 | 9999.9% | 100.0% | $228 | 10/31/2025 |
| | Off-Road Veh | $259 | 9999.9% | 13.4% | $259 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $259 | 10/31/2025 |
| | Rental M.H. | $1,297 | 4.1% | 13.7% | $1,297 | 4.1% | $0 | 0.0% | 2 | 0.0% | 100.0% | $649 | 10/31/2025 |
| | Travel Trailer | $534 | 15.8% | 10.4% | $0 | -100.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $534 | 10/31/2025 |
| | **Total** | **$33,910** | **2.5%** | **60.5%** | **$29,902** | **6.5%** | **$1,199** | **-2.1%** | **45** | **0.0%** | **93.8%** | **$754** | |
| **Total** | **Total** | **$43,347** | **14.4%** | **48.3%** | **$36,174** | **10.0%** | **$1,199** | **-2.1%** | **46** | **0.0%** | **90.2%** | **$942** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 520 | 2 | $9,759 | 460 | 1 | $6,702 | 0.00 | 41 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **520** | **2** | **$9,759** | **460** | **1** | **6,702** | **0.00** | **41** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 5 | 0 | $0 | 4 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 2 | 1 | $565 | 1 | 1 | $565 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 2 | 1 | $240 | 2 | 1 | $240 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 1 | 1 | $259 | 1 | 1 | $259 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **13** | **3** | **$1,064** | **11** | **3** | **1,064** | **0.27** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **533** | **5** | **$10,823** | **471** | **4** | **7,766** | **0.01** | **41** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Brad Bicksler

Role: LBE

LBE UPN:1280476

CYNTHIA WOLTZ INSURANCE AGENCY INC

Address: 205 FLUVANNA AVE

JAMESTOWN NY 14701

Phone/Email: 7166643890 CINDY@WOLTZINSURANCE.COM

NY

# Agency Scorecard

## 1280481, KIM MATHIS AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $9,292 | 75.3% | 6.1% | $7,506 | 58.7% | $0 | 0.0% | 6 | 20.0% | 100.0% | $1,549 | 10/31/2025 |
| | Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $6,049 | -16.1% | 17.3% | $5,419 | -4.0% | $0 | -100.0% | 10 | -9.1% | 90.9% | $605 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Off-Road Veh | $398 | 95.1% | 8.8% | $398 | 95.1% | $0 | 0.0% | 1 | 0.0% | 50.0% | $398 | 10/31/2025 |
| | Rental M.H. | $850 | 7.6% | 13.8% | $850 | 7.6% | $0 | 0.0% | 1 | 0.0% | 100.0% | $850 | 10/31/2025 |
| | **Total** | **$16,589** | **22.9%** | **11.4%** | **$14,173** | **24.6%** | **$0** | **-100.0%** | **18** | **0.0%** | **90.0%** | **$922** | |
| **Total** | **Total** | **$16,589** | **22.9%** | **11.4%** | **$14,173** | **24.6%** | **$0** | **-100.0%** | **18** | **0.0%** | **90.0%** | **$922** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 3 | 1 | $2,630 | 3 | 1 | $2,630 | 0.33 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 6 | 0 | $0 | 6 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 3 | 1 | $616 | 2 | 1 | $616 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **13** | **2** | **$3,246** | **12** | **2** | **3,246** | **0.17** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **13** | **2** | **$3,246** | **12** | **2** | **3,246** | **0.17** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Terry Sullivan

Role: LBE

LBE UPN:1280481

KIM MATHIS AGENCY INC

Address: 3610 MIDDLE RESERVATION RD

PERRY NY 14530

Phone/Email: 5857684810 MATHISINSURANCEAGENCY@GMAIL.COM

NY

# Agency Scorecard

## 1281354, ANTINORA,THOMAS

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $29,996 | -1.6% | 5.7% | $26,753 | -5.0% | $3,286 | 33.1% | 23 | 0.0% | 85.2% | $1,304 | 10/31/2025 |
| | Home | $4,984 | 71.9% | 7.8% | $3,558 | 22.7% | $0 | 0.0% | 3 | 50.0% | 100.0% | $1,661 | 10/31/2025 |
| | Mobile Home | $805 | 37.1% | 13.5% | $805 | 37.1% | $0 | 0.0% | 2 | 100.0% | 200.0% | $403 | 10/31/2025 |
| | Motorcycle | $376 | -52.8% | 1.0% | $376 | -52.8% | $0 | 0.0% | 1 | -50.0% | 50.0% | $376 | 10/31/2025 |
| | **Total** | **$36,161** | **4.0%** | **5.9%** | **$31,492** | **-2.9%** | **$3,286** | **33.1%** | **29** | **3.6%** | **87.9%** | **$1,247** | |
| **Total** | **Total** | **$36,161** | **4.0%** | **5.9%** | **$31,492** | **-2.9%** | **$3,286** | **33.1%** | **29** | **3.6%** | **87.9%** | **$1,247** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 8 | 4 | $6,823 | 6 | 3 | $4,646 | 0.50 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 1 | 1 | $1,973 | 1 | 1 | $1,973 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **12** | **5** | **$8,796** | **10** | **4** | **6,619** | **0.40** | **2** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **12** | **5** | **$8,796** | **10** | **4** | **6,619** | **0.40** | **2** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner

Portfolio Owner: Terry Sullivan

Role: LBE

LBE UPN:1281354

ANTINORA,THOMAS

Address: 3101 W RIDGE RD BLDG A

ROCHESTER NY 14626

Phone/Email: 5857238770 AUTOANDHOME4U@YAHOO.COM

NY

# Agency Scorecard

## 1283269, KT INSURANCE AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $29 | -99.4% | 6.2% | ($559) | -110.6% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$29** | **-99.4%** | **6.2%** | **($559)** | **-110.6%** | **$0** | **0.0%** | **0** | **-100.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $16,976 | -47.7% | 8.8% | $18,399 | -43.3% | $0 | -100.0% | 5 | -44.4% | 55.6% | $3,395 | 10/31/2025 |
| | Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $758 | 1.3% | 13.8% | $758 | 1.3% | $0 | 0.0% | 1 | 0.0% | 100.0% | $758 | 10/31/2025 |
| | **Total** | **$17,734** | **-46.6%** | **9.0%** | **$19,157** | **-42.3%** | **$0** | **-100.0%** | **6** | **-40.0%** | **60.0%** | **$2,956** | |
| **Total** | **Total** | **$17,763** | **-53.8%** | **8.9%** | **$18,598** | **-51.7%** | **$0** | **-100.0%** | **6** | **-45.5%** | **54.5%** | **$2,961** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 13 | 0 | $0 | 13 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **13** | **0** | **$0** | **13** | **0** | **0** | **0.00** | **1** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 22 | 0 | $0 | 20 | 0 | $0 | 0.00 | 3 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 5 | 0 | $0 | 5 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **27** | **0** | **$0** | **25** | **0** | **0** | **0.00** | **3** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **40** | **0** | **$0** | **38** | **0** | **0** | **0.00** | **4** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Anthony Metivier

Role: LBE

LBE UPN:1283269

KT INSURANCE AGENCY INC

Address: 110 MAMARONECK AVE STE 7-8

WHITE PLAINS NY 10601

Phone/Email: 9142598944 KT@KTINSURE.COM

NY

# Agency Scorecard

## 1298520, BETH ROGERS AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $4,124 | -281.1% | 534.4% | $4,124 | -355.8% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $4,124 | 10/31/2025 |
| | **Total** | **$4,124** | **-281.1%** | **534.4%** | **$4,124** | **-355.8%** | **$0** | **0.0%** | **1** | **9999.9%** | **100.0%** | **$4,124** | |
| Foremost Choice | Dwelling Fire | $10,508 | -19.6% | 4.6% | $2,367 | -81.9% | $0 | 0.0% | 5 | -28.6% | 71.4% | $2,102 | 10/31/2025 |
| | Home | $5,134 | 6.1% | 5.2% | $5,134 | 6.1% | $0 | 0.0% | 2 | 0.0% | 100.0% | $2,567 | 10/31/2025 |
| | Marine | $100 | 9999.9% | 26.7% | $100 | 9999.9% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $6,596 | 4.1% | 51.3% | $4,813 | 3.5% | ($213) | -147.2% | 9 | 0.0% | 90.0% | $733 | 10/31/2025 |
| | Motor Home | $1,630 | -8.8% | 12.3% | $1,630 | -8.8% | $1,630 | -8.8% | 1 | 0.0% | 100.0% | $1,630 | 10/31/2025 |
| | Travel Trailer | $668 | -51.1% | 12.8% | $668 | -52.3% | $0 | -100.0% | 1 | -50.0% | 50.0% | $668 | 10/31/2025 |
| | **Total** | **$24,636** | **-10.1%** | **17.5%** | **$14,712** | **-42.9%** | **$1,417** | **-30.7%** | **18** | **-14.3%** | **78.3%** | **$1,369** | |
| **Total** | **Total** | **$28,760** | **14.4%** | **45.5%** | **$18,836** | **-22.0%** | **$1,417** | **-30.7%** | **19** | **-9.5%** | **79.2%** | **$1,514** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 13 | 1 | $4,124 | 13 | 1 | $4,124 | 0.08 | 3 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **13** | **1** | **$4,124** | **13** | **1** | **4,124** | **0.08** | **3** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 14 | 0 | $0 | 14 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 10 | 0 | $0 | 10 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 1 | 1 | $100 | 1 | 1 | $100 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 3 | 1 | $678 | 3 | 1 | $678 | 0.33 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **29** | **2** | **$778** | **29** | **2** | **778** | **0.07** | **1** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **42** | **3** | **$4,902** | **42** | **3** | **4,902** | **0.07** | **4** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Brad Bicksler

Role: LBE

LBE UPN:1298520

BETH ROGERS AGENCY INC

Address: 4072 W HENRIETTA RD

ROCHESTER NY 14623

Phone/Email: 5853210015 BETH@BETHROGERSAGENCY.COM

NY

# Agency Scorecard

## 1300551, MARKIN GROUP INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $21,325 | 353.3% | 7.5% | $17,421 | 270.3% | $6,277 | 326.4% | 4 | 100.0% | 80.0% | $5,331 | 10/31/2025 |
| | Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $1,242 | 1.6% | 13.9% | $1,242 | 1.6% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,242 | 10/31/2025 |
| | Motorcycle | $1,549 | -2.6% | 6.2% | $1,549 | -2.6% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,549 | 10/31/2025 |
| | Off-Road Veh | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$24,116** | **220.9%** | **7.9%** | **$20,212** | **168.9%** | **$6,277** | **326.4%** | **6** | **50.0%** | **85.7%** | **$4,019** | |
| **Total** | **Total** | **$24,116** | **220.9%** | **7.9%** | **$20,212** | **168.9%** | **$6,277** | **326.4%** | **6** | **50.0%** | **85.7%** | **$4,019** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 5 | 3 | $8,964 | 3 | 1 | $1,895 | 0.33 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **7** | **3** | **$8,964** | **5** | **1** | **1,895** | **0.20** | **1** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **7** | **3** | **$8,964** | **5** | **1** | **1,895** | **0.20** | **1** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Anthony Metivier

Role: LBE

LBE UPN:1300551

MARKIN GROUP INC

Address: 51B LAFAYETTE AVE

SUFFERN NY 10901

Phone/Email: 8453572796 INFO@MARKININSURANCE.COM

NY

# Agency Scorecard

## 1310104, AW BURCHELL AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $23,624 | 10.0% | 21.9% | $17,477 | -14.3% | $233 | -119.1% | 3 | 0.0% | 42.9% | $7,875 | 10/31/2025 |
| | **Total** | **$23,624** | **10.0%** | **21.9%** | **$17,477** | **-14.3%** | **$233** | **-119.1%** | **3** | **0.0%** | **42.9%** | **$7,875** | |
| Foremost Choice | Dwelling Fire | $12,129 | 90.4% | 7.4% | $11,177 | 140.2% | $5,987 | 189.1% | 7 | 133.3% | 77.8% | $1,733 | 10/31/2025 |
| | Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Marine | $543 | 3.6% | 17.3% | $543 | 3.6% | $0 | 0.0% | 3 | 0.0% | 100.0% | $181 | 10/31/2025 |
| | Mobile Home | $21,840 | -12.6% | 23.5% | $20,446 | -13.6% | $872 | -73.7% | 30 | -3.2% | 75.0% | $728 | 10/31/2025 |
| | Motor Home | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $91 | -85.1% | -2.9% | $91 | -85.1% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Off-Road Veh | $727 | -40.0% | 2.4% | $727 | -40.0% | $0 | 0.0% | 4 | -20.0% | 66.7% | $182 | 10/31/2025 |
| | Rental M.H. | $3,253 | 216.4% | 16.7% | $1,474 | 43.4% | $669 | 9999.9% | 5 | 25.0% | 83.3% | $651 | 10/31/2025 |
| | Travel Trailer | $355 | -88.7% | 10.2% | $656 | -79.2% | ($418) | 0.0% | 2 | -66.7% | 33.3% | $178 | 10/31/2025 |
| | **Total** | **$38,938** | **3.4%** | **17.9%** | **$35,114** | **1.5%** | **$7,110** | **32.1%** | **51** | **-3.8%** | **71.8%** | **$763** | |
| **Total** | **Total** | **$62,562** | **5.8%** | **19.4%** | **$52,591** | **-4.4%** | **$7,343** | **76.5%** | **54** | **-3.6%** | **69.2%** | **$1,159** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 28 | 4 | $11,871 | 25 | 3 | $7,019 | 0.12 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **28** | **4** | **$11,871** | **25** | **3** | **7,019** | **0.12** | **1** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 25 | 6 | $8,598 | 18 | 5 | $7,646 | 0.28 | 5 | 2 | $2,909 | 40.0% | 10/31/2025 |
| | Home | 8 | 0 | $0 | 8 | 0 | $0 | 0.00 | 3 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 27 | 9 | $7,185 | 21 | 5 | $3,859 | 0.24 | 3 | 1 | $560 | 33.3% | 10/31/2025 |
| | Motor Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 2 | 1 | $82 | 2 | 1 | $82 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 8 | 2 | $1,263 | 5 | 0 | $0 | 0.00 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **72** | **18** | **$17,128** | **56** | **11** | **11,587** | **0.20** | **13** | **3** | **$3,469** | **23.1%** | |
| **Grand Total** | | **100** | **22** | **$28,999** | **81** | **14** | **18,606** | **0.17** | **14** | **3** | **$3,469** | **21.4%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Terry Sullivan

Role: LBE

LBE UPN:1310104

AW BURCHELL AGENCY INC

Address: 114 RIVER ST

CORTLAND NY 13045

Phone/Email: 6077530633 ANTHONY@BURCHELLAGENCY.COM

NY

# Agency Scorecard

## 1310107, AW BURCHELL AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $3,023 | -65.3% | 4.4% | $3,513 | -54.5% | $1,174 | 1.7% | 4 | -42.9% | 57.1% | $756 | 10/31/2025 |
| | Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $15,139 | -14.7% | 19.6% | $11,690 | -19.2% | $0 | -100.0% | 18 | -21.7% | 78.3% | $841 | 10/31/2025 |
| | Off-Road Veh | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $2,186 | 64.1% | 15.8% | $2,186 | 64.1% | $0 | 0.0% | 3 | 50.0% | 100.0% | $729 | 10/31/2025 |
| | **Total** | **$20,348** | **-26.8%** | **15.6%** | **$17,389** | **-26.1%** | **$1,174** | **-58.1%** | **25** | **-21.9%** | **75.8%** | **$814** | |
| **Total** | **Total** | **$20,348** | **-26.8%** | **15.6%** | **$17,389** | **-26.1%** | **$1,174** | **-58.1%** | **25** | **-21.9%** | **75.8%** | **$814** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 4 | 0 | $0 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 1 | $771 | 1 | 1 | $771 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **6** | **1** | **$771** | **5** | **1** | **771** | **0.20** | **1** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **6** | **1** | **$771** | **5** | **1** | **771** | **0.20** | **1** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Brad Bicksler

Role: SUB

LBE UPN:1310104

1310104

AW BURCHELL AGENCY INC

Address: 2359 N TRIPHAMMER RD

ITHACA NY 14850

Phone/Email: 6072732926 DEBORAH@BURCHELLAGENCY.COM

NY

# Agency Scorecard

## 1316735, STONE,JOHN PATRICK

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $5,405 | 9999.9% | 345.0% | $1,839 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 50.0% | $5,405 | 10/31/2025 |
| | **Total** | **$5,405** | **9999.9%** | **345.0%** | **$1,839** | **9999.9%** | **$0** | **0.0%** | **1** | **9999.9%** | **50.0%** | **$5,405** | |
| Foremost Choice | Dwelling Fire | $11,467 | -5.6% | 6.4% | $2,935 | -58.6% | ($715) | -152.4% | 13 | -13.3% | 76.5% | $882 | 10/31/2025 |
| | Home | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $18,228 | 37.8% | 1055.7% | $15,883 | 32.3% | $2,592 | 203.5% | 28 | 27.3% | 90.3% | $651 | 10/31/2025 |
| | Motor Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Travel Trailer | $423 | 19.8% | 14.5% | $419 | 18.7% | $49 | 9999.9% | 2 | 0.0% | 100.0% | $212 | 10/31/2025 |
| | **Total** | **$30,118** | **23.0%** | **528.9%** | **$19,237** | **5.7%** | **$1,926** | **-13.2%** | **43** | **10.3%** | **86.0%** | **$700** | |
| **Total** | **Total** | **$35,523** | **45.1%** | **504.1%** | **$21,076** | **15.8%** | **$1,926** | **-13.2%** | **44** | **12.8%** | **84.6%** | **$807** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 16 | 2 | $7,333 | 15 | 1 | $3,767 | 0.07 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **16** | **2** | **$7,333** | **15** | **1** | **3,767** | **0.07** | **2** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 17 | 2 | $3,310 | 7 | 0 | $0 | 0.00 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 3 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 18 | 9 | $6,275 | 18 | 9 | $6,275 | 0.50 | 3 | 2 | $1,729 | 66.7% | 10/31/2025 |
| | Motor Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **40** | **11** | **$9,585** | **28** | **9** | **6,275** | **0.32** | **5** | **2** | **$1,729** | **40.0%** | |
| **Grand Total** | | **56** | **13** | **$16,918** | **43** | **10** | **10,042** | **0.23** | **7** | **2** | **$1,729** | **28.6%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Brad Bicksler

Role: LBE

LBE UPN:1316735

STONE,JOHN PATRICK

Address: 46 PUBLIC SQ

HOLLEY NY 14470

Phone/Email: 5856386355 SUSANP02@OUTLOOK.COM

NY

# Agency Scorecard

## 1325119, RYAN FERRARO AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $11,856 | -22.6% | 127.1% | $9,900 | -26.5% | $2,490 | 2.7% | 8 | -33.3% | 66.7% | $1,482 | 10/31/2025 |
| | Home | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $8,810 | 0.3% | 13.6% | $8,810 | 0.3% | $791 | -27.8% | 12 | 0.0% | 100.0% | $734 | 10/31/2025 |
| | Motor Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $839 | 176.0% | 11.7% | $839 | 176.0% | $0 | 0.0% | 2 | 0.0% | 100.0% | $420 | 10/31/2025 |
| | **Total** | **$21,505** | **-12.2%** | **82.7%** | **$19,549** | **-13.8%** | **$3,281** | **-6.8%** | **22** | **-15.4%** | **84.6%** | **$978** | |
| **Total** | **Total** | **$21,505** | **-12.2%** | **82.7%** | **$19,549** | **-13.8%** | **$3,281** | **-6.8%** | **22** | **-15.4%** | **84.6%** | **$978** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **4** | **0** | **$0** | **4** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **4** | **0** | **$0** | **4** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner

Portfolio Owner: Brad Bicksler

Role: LBE

LBE UPN:1325119

RYAN FERRARO AGENCY INC

Address: 6043 TRANSIT RD STE 101

EAST AMHERST NY 14051

Phone/Email: 7166882199 RYAN@FERRAROINSURANCE.COM

# Agency Scorecard

**NY**

## 1353421, JAC INSURANCE AGENCY LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $5,247 | -958.8% | 6.2% | $5,489 | 26.8% | $0 | -100.0% | 1 | 0.0% | 100.0% | $5,247 | 10/31/2025 |
| | **Total** | **$5,247** | **-958.8%** | **6.2%** | **$5,489** | **26.8%** | **$0** | **-100.0%** | **1** | **0.0%** | **100.0%** | **$5,247** | |
| Foremost Choice | Dwelling Fire | $5,172 | 24.3% | 4.9% | $3,330 | 37.5% | $40 | 9999.9% | 7 | 0.0% | 100.0% | $739 | 10/31/2025 |
| | Marine | $289 | 26.2% | 16.7% | $289 | 1.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $289 | 10/31/2025 |
| | Mobile Home | $11,803 | 8.0% | 34.6% | $10,453 | 9.2% | $1,596 | 1.1% | 20 | 0.0% | 90.9% | $590 | 10/31/2025 |
| | Motor Home | $2,469 | -12.6% | 14.7% | $2,469 | -12.6% | $0 | 0.0% | 3 | 0.0% | 100.0% | $823 | 10/31/2025 |
| | Motorcycle | ($2) | -100.3% | 11.3% | ($2) | -100.3% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $2,019 | 6.5% | 13.8% | $2,019 | 6.5% | $0 | 0.0% | 3 | 0.0% | 100.0% | $673 | 10/31/2025 |
| | **Total** | **$21,750** | **5.4%** | **22.5%** | **$18,558** | **5.6%** | **$1,636** | **3.7%** | **34** | **-2.9%** | **91.9%** | **$640** | |
| **Total** | **Total** | **$26,997** | **34.9%** | **19.4%** | **$24,047** | **9.7%** | **$1,636** | **-22.4%** | **35** | **-2.8%** | **92.1%** | **$771** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 141 | 0 | $0 | 132 | 0 | $0 | 0.00 | 15 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **141** | **0** | **$0** | **132** | **0** | **0** | **0.00** | **15** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 4 | 0 | $0 | 4 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 6 | 2 | $1,195 | 6 | 2 | $1,195 | 0.33 | 1 | 1 | $516 | 100.0% | 10/31/2025 |
| | Motor Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **10** | **2** | **$1,195** | **10** | **2** | **1,195** | **0.20** | **1** | **1** | **$516** | **100.0%** | |
| **Grand Total** | | **151** | **2** | **$1,195** | **142** | **2** | **1,195** | **0.01** | **16** | **1** | **$516** | **6.3%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Terry Sullivan

Role: LBE

LBE UPN:1353421

JAC INSURANCE AGENCY LLC

Address: 7700 PITTSFORD PALMYRA RD

FAIRPORT NY 14450

Phone/Email: 5854651726 SERVICE@JACINSURANCENY.COM

# Agency Scorecard

**OH**

## 168899, TOM HAMSHER INS AGENCY, INC.

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $17,725 | -30.9% | 11.0% | $12,915 | -33.4% | ($118) | -107.7% | 15 | -25.0% | 75.0% | $1,182 | 10/31/2025 |
| | Home | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Marine | $435 | 95.9% | -1.1% | $435 | 95.9% | $0 | 0.0% | 3 | 50.0% | 100.0% | $145 | 10/31/2025 |
| | Mobile Home | $5,677 | 8.2% | 20.4% | $5,677 | 8.2% | $1,066 | 38.1% | 6 | 0.0% | 100.0% | $946 | 10/31/2025 |
| | Motor Home | $717 | -0.8% | 6.9% | $717 | -0.8% | $0 | 0.0% | 1 | 0.0% | 100.0% | $717 | 10/31/2025 |
| | Motorcycle | $1,343 | -13.1% | 0.8% | $1,343 | -13.1% | $0 | 0.0% | 6 | -14.3% | 85.7% | $224 | 10/31/2025 |
| | Off-Road Veh | $968 | -2.1% | 1.1% | $331 | -2.1% | $331 | -2.1% | 3 | 0.0% | 100.0% | $323 | 10/31/2025 |
| | Rental M.H. | $2,640 | -14.7% | 20.8% | $2,134 | -16.0% | $612 | 2.2% | 6 | 0.0% | 100.0% | $440 | 10/31/2025 |
| | Travel Trailer | $414 | -3.5% | 16.2% | $414 | -3.5% | $0 | 0.0% | 1 | 0.0% | 100.0% | $414 | 10/31/2025 |
| | **Total** | **$29,919** | **-19.6%** | **11.8%** | **$23,966** | **-19.5%** | **$1,891** | **-41.6%** | **41** | **-10.9%** | **87.2%** | **$730** | |
| **Total** | **Total** | **$29,919** | **-19.6%** | **11.8%** | **$23,966** | **-19.5%** | **$1,891** | **-41.6%** | **41** | **-10.9%** | **87.2%** | **$730** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | 7 | 0 | $0 | 5 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 1 | 1 | $133 | 1 | 1 | $133 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **9** | **1** | **$133** | **7** | **1** | **133** | **0.14** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **9** | **1** | **$133** | **7** | **1** | **133** | **0.14** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner

Portfolio Owner: Brendan O'Connell

Role: LBE

LBE UPN:168899

TOM HAMSHER INS AGENCY, INC.

Address: 994 W MAIN ST

SUGARCREEK OH 44681

Phone/Email: 3308524087 JOE@HAMSHERINSURANCE.COM

**OH**

# Agency Scorecard

## 1240305, DUSTIN BURGESS INSURANCE GROUP LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $31,017 | 9.1% | 12.2% | $29,407 | 9.7% | $2,498 | 9999.9% | 30 | 11.1% | 78.9% | $1,034 | 10/31/2025 |
| | Home | $12,309 | 34.1% | 71.1% | $7,228 | 26.5% | $1,485 | 9999.9% | 7 | 16.7% | 100.0% | $1,758 | 10/31/2025 |
| | Mobile Home | $13,275 | 60.9% | 20.8% | $10,990 | 31.0% | $2,411 | 9999.9% | 11 | 22.2% | 91.7% | $1,207 | 10/31/2025 |
| | Rental M.H. | $6,815 | 195.3% | 22.2% | $6,815 | 195.3% | $0 | 0.0% | 6 | 100.0% | 100.0% | $1,136 | 10/31/2025 |
| | Travel Trailer | $0 | -100.0% | 16.1% | $0 | -100.0% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$63,416** | **30.3%** | **25.9%** | **$54,440** | **24.5%** | **$6,394** | **9999.9%** | **54** | **17.4%** | **84.4%** | **$1,174** | |
| **Total** | **Total** | **$63,416** | **30.3%** | **25.9%** | **$54,440** | **24.5%** | **$6,394** | **9999.9%** | **54** | **17.4%** | **84.4%** | **$1,174** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 2 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **2** | **0** | **$0** | **1** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 26 | 11 | $17,629 | 24 | 11 | $17,629 | 0.46 | 2 | 2 | $2,498 | 100.0% | 10/31/2025 |
| | Home | 5 | 1 | $1,395 | 4 | 0 | $0 | 0.00 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 7 | 3 | $3,344 | 4 | 2 | $1,059 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 3 | 3 | $4,052 | 3 | 3 | $4,052 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **41** | **18** | **$26,420** | **35** | **16** | **22,740** | **0.46** | **4** | **2** | **$2,498** | **50.0%** | |
| **Grand Total** | | **43** | **18** | **$26,420** | **36** | **16** | **22,740** | **0.44** | **4** | **2** | **$2,498** | **50.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1240305

DUSTIN BURGESS INSURANCE GROUP LLC

Address: 950 S SAWBURG AVE

ALLIANCE OH 44601

Phone/Email: 3308218567 DUSTIN@BURGESSINSURANCEGROUP.COM

**OH**

# Agency Scorecard

## 1265782, THE AGENCY COLLECTIVE LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| **Total** | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Eric Schmidt

Role: LBE

LBE UPN:1265782

THE AGENCY COLLECTIVE LLC

Address: 11335 CONCORD HAMBDEN RD

CONCORD TOWNSHIP OH 44077

Phone/Email: 8008063316 KENNY@THEAGENCYCLUSTER.COM

**OH**

# Agency Scorecard

## 1277472, R & L INSURANCE GROUP LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $129,879 | 12.2% | 181.7% | $114,178 | 3.8% | $9,741 | 1.6% | 123 | 12.8% | 88.5% | $1,056 | 10/31/2025 |
| | Home | $18,715 | 21.1% | 15.0% | $14,442 | -13.6% | $151 | -94.7% | 13 | 30.0% | 72.2% | $1,440 | 10/31/2025 |
| | Mobile Home | $27,419 | 4.9% | 32.7% | $23,905 | 13.8% | $1,438 | 62.9% | 29 | 3.6% | 80.6% | $945 | 10/31/2025 |
| | Motorcycle | $2,418 | -7.9% | 21.9% | $2,418 | -7.9% | $476 | 0.0% | 4 | 0.0% | 100.0% | $605 | 10/31/2025 |
| | Off-Road Veh | $862 | 169.4% | 3.3% | $862 | 169.4% | $0 | 0.0% | 2 | 100.0% | 100.0% | $431 | 10/31/2025 |
| | Rental M.H. | $3,133 | 119.7% | 22.0% | $1,826 | 28.1% | $162 | 0.6% | 5 | 25.0% | 100.0% | $627 | 10/31/2025 |
| | Travel Trailer | $874 | -2.3% | 16.9% | $874 | -2.3% | $0 | 0.0% | 2 | 0.0% | 100.0% | $437 | 10/31/2025 |
| | **Total** | **$183,300** | **12.7%** | **136.5%** | **$158,505** | **3.6%** | **$11,968** | **-14.2%** | **178** | **12.7%** | **86.4%** | **$1,030** | |
| **Total** | **Total** | **$183,300** | **12.7%** | **136.5%** | **$158,505** | **3.6%** | **$11,968** | **-14.2%** | **178** | **12.7%** | **86.4%** | **$1,030** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 96 | 30 | $40,687 | 84 | 27 | $36,503 | 0.32 | 8 | 5 | $5,381 | 62.5% | 10/31/2025 |
| | Home | 26 | 8 | $12,129 | 21 | 5 | $7,424 | 0.24 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 15 | 8 | $4,697 | 14 | 7 | $4,138 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 1 | 1 | $560 | 1 | 1 | $560 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 1 | $814 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **140** | **48** | **$58,887** | **121** | **40** | **48,625** | **0.33** | **10** | **5** | **$5,381** | **50.0%** | |
| **Grand Total** | | **140** | **48** | **$58,887** | **121** | **40** | **48,625** | **0.33** | **10** | **5** | **$5,381** | **50.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Brendan O'Connell

Role: LBE

LBE UPN:1277472

R & L INSURANCE GROUP LLC

Address: 12085 SHERATON LN

CINCINNATI OH 45246

Phone/Email: 5133463200 MROTERT@RANDLINSURANCE.COM

**OH**

# Agency Scorecard

## 1277502, R & L INSURANCE GROUP LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Marine | $517 | 44.4% | 7.4% | $517 | 44.4% | $0 | 0.0% | 1 | 0.0% | 100.0% | $517 | 10/31/2025 |
| | Mobile Home | $4,008 | 5.2% | 17.5% | $4,008 | 5.2% | $0 | 0.0% | 2 | 0.0% | 100.0% | $2,004 | 10/31/2025 |
| | **Total** | **$4,525** | **8.5%** | **16.5%** | **$4,525** | **8.5%** | **$0** | **0.0%** | **3** | **0.0%** | **100.0%** | **$1,508** | |
| **Total** | **Total** | **$4,525** | **8.5%** | **16.5%** | **$4,525** | **8.5%** | **$0** | **0.0%** | **3** | **0.0%** | **100.0%** | **$1,508** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **2** | **0** | **$0** | **2** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **2** | **0** | **$0** | **2** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Brendan O'Connell

Role: SUB

LBE UPN:1277472

1277472

R & L INSURANCE GROUP LLC

Address: 12085 SHERATON LN

CINCINNATI OH 45246

Phone/Email: 5133463200 MROTERT@RANDLINSURANCE.COM

# Agency Scorecard

**OH**

## 1278185, HOSTETLER INSURANCE GROUP LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $69,231 | 33.8% | 13.6% | $61,201 | 38.6% | $6,294 | -35.0% | 79 | 58.0% | 91.9% | $876 | 10/31/2025 |
| | Home | $16,997 | 44.9% | 15.8% | $17,626 | 50.3% | $0 | -100.0% | 11 | 37.5% | 78.6% | $1,545 | 10/31/2025 |
| | Mobile Home | $16,945 | 1.2% | 20.9% | $12,502 | -3.2% | $3,322 | 7.3% | 16 | 0.0% | 94.1% | $1,059 | 10/31/2025 |
| | Motorcycle | $0 | -100.0% | -5.6% | $0 | -100.0% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $354 | -204.4% | 24.5% | $354 | -204.4% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $354 | 10/31/2025 |
| | **Total** | **$103,527** | **29.3%** | **15.4%** | **$91,683** | **33.5%** | **$9,616** | **-17.9%** | **107** | **42.7%** | **89.9%** | **$968** | |
| **Total** | **Total** | **$103,527** | **29.3%** | **15.4%** | **$91,683** | **33.5%** | **$9,616** | **-17.9%** | **107** | **42.7%** | **89.9%** | **$968** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 92 | 36 | $33,182 | 81 | 32 | $30,194 | 0.40 | 11 | 3 | $3,372 | 27.3% | 10/31/2025 |
| | Home | 47 | 6 | $10,213 | 42 | 6 | $10,213 | 0.14 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 9 | 1 | $1,157 | 6 | 1 | $1,157 | 0.17 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 2 | 1 | $354 | 1 | 1 | $354 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **150** | **44** | **$44,906** | **130** | **40** | **41,918** | **0.31** | **13** | **3** | **$3,372** | **23.1%** | |
| **Grand Total** | | **150** | **44** | **$44,906** | **130** | **40** | **41,918** | **0.31** | **13** | **3** | **$3,372** | **23.1%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1278185

HOSTETLER INSURANCE GROUP LLC

Address: 4562 DRESSLER RD NW

CANTON OH 44718

Phone/Email: 3308719580 SHANNON@HOSTETLERINSURANCEGROUP.COM

# Agency Scorecard

**OH**

## 1278512, VARNER INSURANCE GROUP INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | ($698) | -129.9% | -25.8% | ($698) | -129.9% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **($698)** | **-129.9%** | **-25.8%** | **($698)** | **-129.9%** | **$0** | **0.0%** | **0** | **-100.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $61,801 | 33.6% | 12.2% | $48,685 | 19.9% | $4,731 | 66.0% | 41 | 2.5% | 87.2% | $1,507 | 10/31/2025 |
| | Home | $16,882 | 27.5% | 13.2% | $16,882 | 10.9% | $0 | 0.0% | 7 | 0.0% | 87.5% | $2,412 | 10/31/2025 |
| | Mobile Home | $8,901 | 18.9% | 20.8% | $6,432 | 25.1% | $1,006 | 6.6% | 9 | 12.5% | 90.0% | $989 | 10/31/2025 |
| | Off-Road Veh | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | ($678) | -133.3% | 11.3% | ($82) | -104.0% | $0 | -100.0% | 1 | -66.7% | 33.3% | ($678) | 10/31/2025 |
| | Travel Trailer | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$86,906** | **25.9%** | **13.3%** | **$71,917** | **14.2%** | **$5,737** | **36.3%** | **58** | **0.0%** | **85.3%** | **$1,498** | |
| **Total** | **Total** | **$86,208** | **20.8%** | **12.7%** | **$71,219** | **9.0%** | **$5,737** | **36.3%** | **58** | **-1.7%** | **84.1%** | **$1,486** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 40 | 7 | $14,393 | 27 | 4 | $8,157 | 0.15 | 5 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 14 | 1 | $2,277 | 10 | 1 | $2,277 | 0.10 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 5 | 2 | $1,220 | 4 | 2 | $1,220 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **59** | **10** | **$17,890** | **41** | **7** | **11,654** | **0.17** | **5** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **59** | **10** | **$17,890** | **41** | **7** | **11,654** | **0.17** | **5** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Brendan O'Connell

Role: LBE

LBE UPN:1278512

VARNER INSURANCE GROUP INC

Address: 124 PERRY DR NW

CANTON OH 44708

Phone/Email: 3308372288 KERIC@VARNERINSGROUP.COM

**OH**

# Agency Scorecard

## 1278520, VARNER INSURANCE GROUP INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $1,107 | -44.1% | 6.7% | $1,107 | -51.7% | $0 | 0.0% | 2 | -33.3% | 66.7% | $554 | 10/31/2025 |
| | Mobile Home | $0 | -100.0% | 21.0% | $0 | -100.0% | ($748) | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$1,107** | **-58.4%** | **10.9%** | **$1,107** | **-62.8%** | **($748)** | **0.0%** | **2** | **-50.0%** | **50.0%** | **$554** | |
| **Total** | **Total** | **$1,107** | **-58.4%** | **10.9%** | **$1,107** | **-62.8%** | **($748)** | **0.0%** | **2** | **-50.0%** | **50.0%** | **$554** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **1** | **0** | **$0** | **1** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **1** | **0** | **$0** | **1** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: SUB

LBE UPN:1278512

1278512

VARNER INSURANCE GROUP INC

Address: 203 S PROSPECT AVE

HARTVILLE OH 44632

Phone/Email: 3308773622 JASONV@VARNERINSGROUP.COM

**OH**

# Agency Scorecard

## 1279034, SCHEELER,MARK R

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $28,177 | 299.6% | 12.5% | $26,776 | 259.8% | $0 | -100.0% | 16 | 77.8% | 84.2% | $1,761 | 10/31/2025 |
| | Home | $12,403 | 106.4% | 12.6% | $9,343 | 109.3% | $1,789 | 52.5% | 8 | 60.0% | 80.0% | $1,550 | 10/31/2025 |
| | Mobile Home | $2,562 | -4.4% | 19.8% | $1,799 | -6.8% | $0 | 0.0% | 3 | 0.0% | 100.0% | $854 | 10/31/2025 |
| | Motorcycle | $4,594 | 15.5% | 3.3% | $4,594 | 34.4% | $615 | -22.9% | 5 | 0.0% | 83.3% | $919 | 10/31/2025 |
| | **Total** | **$47,736** | **142.1%** | **12.0%** | **$42,512** | **146.4%** | **$2,404** | **-16.5%** | **32** | **45.5%** | **84.2%** | **$1,492** | |
| **Total** | **Total** | **$47,736** | **142.1%** | **12.0%** | **$42,512** | **146.4%** | **$2,404** | **-16.5%** | **32** | **45.5%** | **84.2%** | **$1,492** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 25 | 10 | $20,560 | 22 | 10 | $20,560 | 0.45 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 10 | 5 | $9,195 | 10 | 5 | $9,195 | 0.50 | 0 | 1 | $1,789 | 0.0% | 10/31/2025 |
| | Mobile Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 2 | 1 | $1,152 | 1 | 1 | $1,152 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **38** | **16** | **$30,907** | **34** | **16** | **30,907** | **0.47** | **1** | **1** | **$1,789** | **100.0%** | |
| **Grand Total** | | **38** | **16** | **$30,907** | **34** | **16** | **30,907** | **0.47** | **1** | **1** | **$1,789** | **100.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1279034

SCHEELER,MARK R

Address: 419 E PERKINS AVE

SANDUSKY OH 44870

Phone/Email: 4196263337 MARK@SCHEELERINSURANCE.COM

# Agency Scorecard

**OH**

## 1279303, HEINL,BERNARD J

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $23,264 | 28.1% | 13.8% | $23,085 | 27.1% | $4,325 | 29.7% | 14 | 0.0% | 87.5% | $1,662 | 10/31/2025 |
| | Home | $3,112 | 246.9% | 13.7% | $3,112 | 246.9% | $0 | 0.0% | 2 | 100.0% | 100.0% | $1,556 | 10/31/2025 |
| | Marine | $153 | 47.1% | 7.9% | $153 | 47.1% | $0 | 0.0% | 1 | 0.0% | 100.0% | $153 | 10/31/2025 |
| | Mobile Home | $4,613 | -14.8% | 18.1% | $4,613 | -14.8% | $0 | -100.0% | 6 | -14.3% | 85.7% | $769 | 10/31/2025 |
| | Rental M.H. | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Travel Trailer | $707 | -1.5% | 16.4% | $0 | 0.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $707 | 10/31/2025 |
| | **Total** | **$31,849** | **25.9%** | **14.5%** | **$30,963** | **26.0%** | **$4,325** | **4.3%** | **24** | **0.0%** | **88.9%** | **$1,327** | |
| **Total** | **Total** | **$31,849** | **25.9%** | **14.5%** | **$30,963** | **26.0%** | **$4,325** | **4.3%** | **24** | **0.0%** | **88.9%** | **$1,327** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 16 | 2 | $7,858 | 15 | 2 | $7,858 | 0.13 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 2 | 1 | $1,409 | 1 | 1 | $1,409 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **19** | **3** | **$9,267** | **17** | **3** | **9,267** | **0.18** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **19** | **3** | **$9,267** | **17** | **3** | **9,267** | **0.18** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1279303

HEINL,BERNARD J

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TOLEDO OH 43617

Phone/Email: 4198419036 BERNIE@HEINLINSURANCE.COM

**OH**

# Agency Scorecard

## 1280118, LAMBERT,WILLIAM S

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $1,530 | -59.6% | 1.0% | $778 | -74.0% | $0 | 0.0% | 1 | -50.0% | 50.0% | $1,530 | 10/31/2025 |
| | **Total** | **$1,530** | **-59.6%** | **1.0%** | **$778** | **-74.0%** | **$0** | **0.0%** | **1** | **-50.0%** | **50.0%** | **$1,530** | |
| Foremost Choice | Dwelling Fire | $45,775 | 6.6% | 12.0% | $39,839 | 13.1% | $5,619 | -42.6% | 36 | 12.5% | 97.3% | $1,272 | 10/31/2025 |
| | Home | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$45,775** | **4.0%** | **11.9%** | **$39,839** | **9.8%** | **$5,619** | **-42.6%** | **36** | **12.5%** | **97.3%** | **$1,272** | |
| **Total** | **Total** | **$47,305** | **-1.0%** | **11.4%** | **$40,617** | **3.4%** | **$5,619** | **-42.6%** | **37** | **8.8%** | **94.9%** | **$1,279** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 3 | 0 | $0 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **3** | **0** | **$0** | **3** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 28 | 5 | $7,125 | 23 | 4 | $5,538 | 0.17 | 4 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 5 | 0 | $0 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **33** | **5** | **$7,125** | **26** | **4** | **5,538** | **0.15** | **4** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **36** | **5** | **$7,125** | **29** | **4** | **5,538** | **0.14** | **4** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1280118

LAMBERT,WILLIAM S

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MAYFIELD VILLAGE OH 44143

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**OH**

# Agency Scorecard

## 1280151, JORDAN,MATTHEW DUANE

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $1,508 | -57.7% | 840.8% | $1,508 | -44.5% | $0 | 0.0% | 3 | -25.0% | 75.0% | $503 | 10/31/2025 |
| | Home | $2,248 | 14.2% | 9.6% | $2,248 | 14.2% | $0 | 0.0% | 1 | 0.0% | 100.0% | $2,248 | 10/31/2025 |
| | Mobile Home | $8,917 | 4.6% | 20.4% | $8,430 | -7.7% | $1,098 | 6.3% | 10 | 0.0% | 90.9% | $892 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Off-Road Veh | $694 | 48.3% | 3.3% | $694 | 200.4% | $694 | 200.4% | 2 | 100.0% | 100.0% | $347 | 10/31/2025 |
| | Rental M.H. | $740 | -32.1% | 16.5% | ($57) | -105.2% | $373 | 9999.9% | 2 | 0.0% | 66.7% | $370 | 10/31/2025 |
| | Travel Trailer | $3,072 | 121.2% | 17.8% | $3,072 | 121.2% | $0 | 0.0% | 3 | 200.0% | 100.0% | $1,024 | 10/31/2025 |
| | **Total** | **$17,179** | **1.0%** | **150.3%** | **$15,895** | **-3.8%** | **$2,165** | **71.3%** | **21** | **10.5%** | **87.5%** | **$818** | |
| **Total** | **Total** | **$17,179** | **1.0%** | **150.3%** | **$15,895** | **-3.8%** | **$2,165** | **71.3%** | **21** | **10.5%** | **87.5%** | **$818** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 4 | 1 | $487 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 1 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 1 | 1 | $480 | 1 | 1 | $480 | 1.00 | 1 | 1 | $480 | 100.0% | 10/31/2025 |
| | Rental M.H. | 1 | 1 | $373 | 1 | 1 | $373 | 1.00 | 1 | 1 | $373 | 100.0% | 10/31/2025 |
| | Travel Trailer | 2 | 2 | $1,734 | 2 | 2 | $1,734 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **9** | **5** | **$3,074** | **7** | **4** | **2,587** | **0.57** | **2** | **2** | **$853** | **100.0%** | |
| **Grand Total** | | **9** | **5** | **$3,074** | **7** | **4** | **2,587** | **0.57** | **2** | **2** | **$853** | **100.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1280151

JORDAN,MATTHEW DUANE

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GREENVILLE OH 45331

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# Agency Scorecard

**OH**

## 1280339, ANDREW SCHOCH AGENCY LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $6,997 | 43.1% | 12.8% | $6,586 | -19.5% | $1,459 | 1.6% | 13 | -7.1% | 81.3% | $538 | 10/31/2025 |
| | Home | $722 | -15.3% | 11.4% | $722 | -15.3% | $0 | 0.0% | 1 | 0.0% | 100.0% | $722 | 10/31/2025 |
| | Marine | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $6,405 | -25.4% | 20.1% | $4,919 | -13.0% | $0 | 0.0% | 10 | 0.0% | 83.3% | $641 | 10/31/2025 |
| | Rental M.H. | $2,530 | 9999.9% | 26.2% | $1,718 | 9999.9% | $829 | 9999.9% | 2 | 9999.9% | 100.0% | $1,265 | 10/31/2025 |
| | Travel Trailer | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$16,654** | **16.3%** | **16.7%** | **$13,945** | **-5.1%** | **$2,288** | **59.3%** | **26** | **4.0%** | **83.9%** | **$641** | |
| **Total** | **Total** | **$16,654** | **16.3%** | **16.7%** | **$13,945** | **-5.1%** | **$2,288** | **59.3%** | **26** | **4.0%** | **83.9%** | **$641** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 6 | 2 | $1,842 | 5 | 1 | $874 | 0.20 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 5 | 2 | $1,248 | 5 | 2 | $1,248 | 0.40 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 3 | 2 | $1,811 | 2 | 1 | $999 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **15** | **6** | **$4,901** | **13** | **4** | **3,121** | **0.31** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **15** | **6** | **$4,901** | **13** | **4** | **3,121** | **0.31** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1280339

ANDREW SCHOCH AGENCY LLC

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Phone/Email: 4195625520 ANDREW.SCHOCH@SCHOCHAGENCY.COM

# Agency Scorecard

**OH**

## 1280734, SKALA INSURANCE AGENCY LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $83,180 | 93.3% | 265.1% | $75,658 | 120.2% | $14,205 | 616.7% | 53 | 51.4% | 67.9% | $1,569 | 10/31/2025 |
| | Home | $21,044 | 220.5% | 15.2% | $17,757 | 329.7% | $3,895 | 31.6% | 13 | 160.0% | 81.3% | $1,619 | 10/31/2025 |
| | Mobile Home | $12,370 | 45.6% | 22.0% | $11,120 | 56.2% | $0 | -100.0% | 12 | 20.0% | 92.3% | $1,031 | 10/31/2025 |
| | Motorcycle | $327 | 9999.9% | 10.6% | $327 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $327 | 10/31/2025 |
| | Rental M.H. | $817 | 2.1% | 20.9% | $817 | 2.1% | $0 | 0.0% | 1 | 0.0% | 100.0% | $817 | 10/31/2025 |
| | Travel Trailer | $328 | -7.1% | 16.3% | $328 | -7.1% | $0 | 0.0% | 1 | 0.0% | 100.0% | $328 | 10/31/2025 |
| | **Total** | **$118,066** | **99.3%** | **183.3%** | **$106,007** | **126.7%** | **$18,100** | **244.3%** | **81** | **55.8%** | **73.6%** | **$1,458** | |
| **Total** | **Total** | **$118,066** | **99.3%** | **183.3%** | **$106,007** | **126.7%** | **$18,100** | **244.3%** | **81** | **55.8%** | **73.6%** | **$1,458** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 109 | 43 | $76,837 | 96 | 40 | $73,283 | 0.42 | 12 | 6 | $15,612 | 50.0% | 10/31/2025 |
| | Home | 50 | 11 | $15,847 | 43 | 9 | $12,560 | 0.21 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 9 | 3 | $4,269 | 6 | 3 | $4,269 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 1 | 1 | $327 | 1 | 1 | $327 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **169** | **58** | **$97,280** | **146** | **53** | **90,439** | **0.36** | **14** | **6** | **$15,612** | **42.9%** | |
| **Grand Total** | | **169** | **58** | **$97,280** | **146** | **53** | **90,439** | **0.36** | **14** | **6** | **$15,612** | **42.9%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Jim Horvath

Role: LBE

LBE UPN:1280734

SKALA INSURANCE AGENCY LLC

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**OH**

# Agency Scorecard

## 1281527, DAN YANAK INSURANCE AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $49,998 | 53.7% | 12.4% | $31,075 | 31.1% | $4,611 | -379.5% | 34 | 30.8% | 79.1% | $1,471 | 10/31/2025 |
| | Home | $14,261 | 15.9% | 11.5% | $10,749 | -12.6% | $2,573 | -4.4% | 9 | 12.5% | 69.2% | $1,585 | 10/31/2025 |
| | Marine | $100 | 0.0% | 6.7% | $100 | 0.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $100 | 10/31/2025 |
| | Mobile Home | $13,667 | 33.0% | 22.1% | $11,209 | 37.3% | ($735) | -190.6% | 14 | 27.3% | 73.7% | $976 | 10/31/2025 |
| | Off-Road Veh | $50 | -35.1% | 0.0% | ($28) | 0.0% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Travel Trailer | $477 | 0.0% | 17.9% | $0 | -100.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $477 | 10/31/2025 |
| | **Total** | **$78,553** | **40.9%** | **14.0%** | **$53,105** | **18.7%** | **$6,449** | **248.2%** | **59** | **22.9%** | **75.6%** | **$1,331** | |
| **Total** | **Total** | **$78,553** | **40.9%** | **14.0%** | **$53,105** | **18.7%** | **$6,449** | **248.2%** | **59** | **22.9%** | **75.6%** | **$1,331** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 30 | 17 | $31,491 | 27 | 14 | $27,101 | 0.52 | 1 | 2 | $4,097 | 200.0% | 10/31/2025 |
| | Home | 23 | 5 | $9,059 | 19 | 2 | $4,664 | 0.11 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 12 | 8 | $7,904 | 9 | 7 | $6,856 | 0.78 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **68** | **30** | **$48,454** | **58** | **23** | **38,621** | **0.40** | **6** | **2** | **$4,097** | **33.3%** | |
| **Grand Total** | | **68** | **30** | **$48,454** | **58** | **23** | **38,621** | **0.40** | **6** | **2** | **$4,097** | **33.3%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Lisa Phillips

Role: LBE

LBE UPN:1281527

DAN YANAK INSURANCE AGENCY INC

Address: 1406 E PERKINS AVE

SANDUSKY OH 44870

Phone/Email: 4196257353 DAN@YANAKGROUP.COM

**OH**

# Agency Scorecard

## 1281538, DAN YANAK INSURANCE AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $14,560 | 896.6% | 16.2% | $5,375 | 267.9% | $3,289 | -359.6% | 6 | 200.0% | 85.7% | $2,427 | 10/31/2025 |
| | Home | $6,457 | -28.2% | 13.0% | $6,457 | 8.1% | $0 | 0.0% | 2 | 0.0% | 100.0% | $3,229 | 10/31/2025 |
| | **Total** | **$21,017** | **101.0%** | **14.7%** | **$11,832** | **59.2%** | **$3,289** | **-359.6%** | **8** | **100.0%** | **88.9%** | **$2,627** | |
| **Total** | **Total** | **$21,017** | **101.0%** | **14.7%** | **$11,832** | **59.2%** | **$3,289** | **-359.6%** | **8** | **100.0%** | **88.9%** | **$2,627** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 6 | 5 | $11,713 | 4 | 3 | $5,064 | 0.75 | 0 | 2 | $3,289 | 0.0% | 10/31/2025 |
| | Home | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **8** | **5** | **$11,713** | **6** | **3** | **5,064** | **0.50** | **1** | **2** | **$3,289** | **200.0%** | |
| **Grand Total** | | **8** | **5** | **$11,713** | **6** | **3** | **5,064** | **0.50** | **1** | **2** | **$3,289** | **200.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: SUB

LBE UPN:1281527

1281527

DAN YANAK INSURANCE AGENCY INC

Address: 590 N LEAVITT RD

AMHERST OH 44001

Phone/Email: 4409884461 DAN@YANAKGROUP.COM

**OH**

# Agency Scorecard

## 1281566, DAN YANAK INSURANCE AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $11,629 | -18.2% | 11.1% | $11,629 | -13.2% | $836 | 1.7% | 11 | -8.3% | 91.7% | $1,057 | 10/31/2025 |
| | Home | $3,939 | -37.0% | 12.0% | $3,939 | -25.6% | $0 | -100.0% | 3 | -25.0% | 75.0% | $1,313 | 10/31/2025 |
| | Marine | $0 | -100.0% | -5.9% | $0 | -100.0% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $39,024 | 3.6% | 162.4% | $34,172 | 0.4% | $7,414 | 30.4% | 46 | 0.0% | 82.1% | $848 | 10/31/2025 |
| | Motorcycle | $417 | -7.3% | 1.5% | $417 | -7.3% | $0 | 0.0% | 2 | 0.0% | 100.0% | $209 | 10/31/2025 |
| | Off-Road Veh | $212 | -4.5% | 1.7% | $212 | -4.5% | $212 | -4.5% | 1 | 0.0% | 100.0% | $212 | 10/31/2025 |
| | Rental M.H. | $18,081 | 4.3% | 20.5% | $17,578 | 7.8% | $0 | -100.0% | 14 | -6.7% | 93.3% | $1,292 | 10/31/2025 |
| | Travel Trailer | $451 | -5.1% | 16.5% | $451 | -5.1% | $0 | 0.0% | 1 | 0.0% | 100.0% | $451 | 10/31/2025 |
| | **Total** | **$73,753** | **-3.9%** | **90.8%** | **$68,398** | **-2.7%** | **$8,462** | **12.9%** | **78** | **-4.9%** | **84.8%** | **$946** | |
| **Total** | **Total** | **$73,753** | **-3.9%** | **90.8%** | **$68,398** | **-2.7%** | **$8,462** | **12.9%** | **78** | **-4.9%** | **84.8%** | **$946** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 15 | 10 | $9,125 | 10 | 7 | $6,845 | 0.70 | 2 | 1 | $849 | 50.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **17** | **10** | **$9,125** | **12** | **7** | **6,845** | **0.58** | **2** | **1** | **$849** | **50.0%** | |
| **Grand Total** | | **17** | **10** | **$9,125** | **12** | **7** | **6,845** | **0.58** | **2** | **1** | **$849** | **50.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Lisa Phillips

Role: SUB

LBE UPN:1281527

1281527

DAN YANAK INSURANCE AGENCY INC

Address: 127 W PERRY ST

PORT CLINTON OH 43452

Phone/Email: 4197323624 DAN@YANAKGROUP.COM

**OH**

# Agency Scorecard

## 1281574, DAN YANAK INSURANCE AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $120 | -90.9% | -45.8% | ($1,285) | -197.9% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Home | $2,327 | 9.8% | 15.7% | $2,327 | 9.8% | $0 | 0.0% | 1 | 0.0% | 100.0% | $2,327 | 10/31/2025 |
| | Mobile Home | $6,337 | 9999.9% | 26.2% | $4,079 | 9999.9% | ($74) | 0.0% | 4 | 9999.9% | 57.1% | $1,584 | 10/31/2025 |
| | **Total** | **$8,784** | **155.9%** | **21.3%** | **$5,121** | **49.2%** | **($74)** | **0.0%** | **5** | **400.0%** | **55.6%** | **$1,757** | |
| **Total** | **Total** | **$8,784** | **155.9%** | **21.3%** | **$5,121** | **49.2%** | **($74)** | **0.0%** | **5** | **400.0%** | **55.6%** | **$1,757** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 1 | 1 | $1,405 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 12 | 7 | $7,376 | 10 | 5 | $5,118 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **13** | **8** | **$8,781** | **10** | **5** | **5,118** | **0.50** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **13** | **8** | **$8,781** | **10** | **5** | **5,118** | **0.50** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: SUB

LBE UPN:1281527

1281527

DAN YANAK INSURANCE AGENCY INC

Address: 126 E BUCKEYE ST

CLYDE OH 43410

Phone/Email: 4195470506 DAN@YANAKGROUP.COM

# Agency Scorecard

**OH**

## 1281708, BROOKS,BARRY

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $67,485 | 121.2% | 108.1% | $56,973 | 209.9% | $10,496 | 1083.3% | 54 | 54.3% | 83.1% | $1,250 | 10/31/2025 |
| | Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $819 | -2.3% | 19.9% | $819 | -2.3% | $0 | 0.0% | 1 | 0.0% | 100.0% | $819 | 10/31/2025 |
| | Travel Trailer | $668 | 0.0% | 19.3% | $668 | 0.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $668 | 10/31/2025 |
| | **Total** | **$68,972** | **115.4%** | **105.2%** | **$58,460** | **193.9%** | **$10,496** | **1083.3%** | **56** | **51.4%** | **83.6%** | **$1,232** | |
| **Total** | **Total** | **$68,972** | **115.4%** | **105.2%** | **$58,460** | **193.9%** | **$10,496** | **1083.3%** | **56** | **51.4%** | **83.6%** | **$1,232** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 3 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **3** | **0** | **$0** | **1** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 68 | 30 | $46,388 | 52 | 29 | $45,431 | 0.56 | 8 | 6 | $11,503 | 75.0% | 10/31/2025 |
| | Home | 6 | 0 | $0 | 5 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **75** | **30** | **$46,388** | **58** | **29** | **45,431** | **0.50** | **8** | **6** | **$11,503** | **75.0%** | |
| **Grand Total** | | **78** | **30** | **$46,388** | **59** | **29** | **45,431** | **0.49** | **8** | **6** | **$11,503** | **75.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1281708

BROOKS,BARRY

Address: 360 BROADWAY AVE

BEDFORD OH 44146

Phone/Email: 2165811100 BARRY@BROOKSAGENCY.US

# Agency Scorecard

**OH**

## 1281753, CSI INSURANCE LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 999.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **999.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $69,242 | 8.0% | 11.2% | $49,286 | 4.4% | $9,860 | 70.6% | 50 | -5.7% | 84.7% | $1,385 | 10/31/2025 |
| | Home | $18,128 | -28.4% | 12.6% | $10,867 | -33.6% | $4,139 | 25.2% | 10 | -9.1% | 71.4% | $1,813 | 10/31/2025 |
| | Mobile Home | $31,657 | 10.8% | 68.0% | $30,245 | 10.5% | $2,256 | -26.8% | 25 | 0.0% | 80.6% | $1,266 | 10/31/2025 |
| | Motor Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $1,844 | 1.4% | 2.5% | $1,844 | 1.4% | $0 | 0.0% | 2 | 0.0% | 100.0% | $922 | 10/31/2025 |
| | Off-Road Veh | $678 | -8.5% | 1.5% | $678 | -8.5% | $0 | 0.0% | 1 | 0.0% | 100.0% | $678 | 10/31/2025 |
| | Rental M.H. | $1,405 | -0.8% | 22.2% | $1,405 | -0.8% | $0 | -100.0% | 2 | 0.0% | 100.0% | $703 | 10/31/2025 |
| | Travel Trailer | $295 | 9999.9% | 20.8% | $295 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $295 | 10/31/2025 |
| | **Total** | **$123,249** | **1.1%** | **25.6%** | **$94,620** | **-0.3%** | **$16,255** | **34.7%** | **91** | **-3.2%** | **82.7%** | **$1,354** | |
| **Total** | **Total** | **$123,249** | **1.1%** | **25.6%** | **$94,620** | **-0.3%** | **$16,255** | **34.7%** | **91** | **-3.2%** | **82.7%** | **$1,354** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 45 | 0 | $0 | 36 | 0 | $0 | 0.00 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **45** | **0** | **$0** | **36** | **0** | **0** | **0.00** | **2** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 49 | 6 | $10,187 | 29 | 4 | $7,235 | 0.14 | 6 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 23 | 3 | $4,988 | 19 | 2 | $4,292 | 0.11 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 8 | 6 | $5,947 | 7 | 6 | $5,947 | 0.86 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 1 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 5 | 0 | $0 | 5 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 2 | 1 | $284 | 2 | 1 | $284 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **89** | **16** | **$21,406** | **63** | **13** | **17,758** | **0.21** | **8** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **134** | **16** | **$21,406** | **99** | **13** | **17,758** | **0.13** | **10** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Lisa Phillips

Role: LBE

LBE UPN:1281753

CSI INSURANCE LLC

Address: 732 W MARKET ST

TIFFIN OH 44883

Phone/Email: 4194480545 CHRIS.SCHIEFER@CSIINSURANCELLC.COM

**OH**

# Agency Scorecard

## 1282096, STANLEY INSURANCE GROUP LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $7,273 | -3.3% | 11.5% | $7,273 | -3.3% | $2,817 | -8.4% | 8 | 0.0% | 100.0% | $909 | 10/31/2025 |
| | Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $1,254 | 2.6% | 15.3% | $497 | -22.0% | $497 | -196.9% | 2 | 0.0% | 100.0% | $627 | 10/31/2025 |
| | Rental M.H. | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$8,527** | **-2.5%** | **11.7%** | **$7,770** | **-4.8%** | **$3,314** | **29.3%** | **10** | **0.0%** | **100.0%** | **$853** | |
| **Total** | **Total** | **$8,527** | **-2.5%** | **11.7%** | **$7,770** | **-4.8%** | **$3,314** | **29.3%** | **10** | **0.0%** | **100.0%** | **$853** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 3 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **4** | **0** | **$0** | **2** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **4** | **0** | **$0** | **2** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner
Portfolio Owner: Brendan O'Connell
Role: LBE
LBE UPN:1282096

STANLEY INSURANCE GROUP LLC
Address: 5038 CEMETERY RD
HILLIARD OH 43026
Phone/Email: 6148761224 BRANDON@STANLEYINSURANCEGROUP.COM

**OH**

# Agency Scorecard

## 1285008, TRENT INSURANCE GROUP INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $21,360 | -13.9% | 50.1% | $15,462 | -15.5% | $0 | -100.0% | 17 | 6.3% | 77.3% | $1,256 | 10/31/2025 |
| | Home | $5,576 | 392.6% | 10.7% | $4,037 | 256.6% | $1,636 | 9999.9% | 2 | 100.0% | 100.0% | $2,788 | 10/31/2025 |
| | Marine | $170 | -6.1% | 15.7% | $170 | -6.1% | $0 | 0.0% | 1 | 0.0% | 100.0% | $170 | 10/31/2025 |
| | Mobile Home | $17,846 | -11.4% | 62.6% | $9,915 | -30.9% | $1,461 | 3.9% | 18 | -21.7% | 78.3% | $991 | 10/31/2025 |
| | Motor Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $1,143 | 100.9% | 5.4% | $1,143 | 100.9% | $0 | 0.0% | 3 | 200.0% | 75.0% | $381 | 10/31/2025 |
| | Off-Road Veh | $1,468 | 339.5% | 9.4% | $1,241 | 271.6% | $0 | 0.0% | 6 | 200.0% | 100.0% | $245 | 10/31/2025 |
| | Rental M.H. | $434 | 1.9% | 20.7% | $434 | 1.9% | $0 | 0.0% | 1 | 0.0% | 100.0% | $434 | 10/31/2025 |
| | Travel Trailer | $0 | -100.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$47,997** | **2.0%** | **50.6%** | **$32,402** | **-8.2%** | **$3,097** | **-40.6%** | **48** | **6.7%** | **81.4%** | **$1,000** | |
| **Total** | **Total** | **$47,997** | **2.0%** | **50.6%** | **$32,402** | **-8.2%** | **$3,097** | **-40.6%** | **48** | **6.7%** | **81.4%** | **$1,000** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **2** | **0** | **$0** | **2** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 35 | 6 | $8,010 | 25 | 6 | $8,010 | 0.24 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 10 | 1 | $1,539 | 7 | 0 | $0 | 0.00 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 7 | 0 | $0 | 6 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 15 | 3 | $7,417 | 14 | 3 | $7,417 | 0.21 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 5 | 4 | $1,328 | 5 | 4 | $1,328 | 0.80 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 3 | 0 | $0 | 3 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **80** | **14** | **$18,294** | **65** | **13** | **16,755** | **0.20** | **7** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **82** | **14** | **$18,294** | **67** | **13** | **16,755** | **0.19** | **7** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Brendan O'Connell

Role: LBE

LBE UPN:1285008

TRENT INSURANCE GROUP INC

Address: 101 E MAIN ST

NORWALK OH 44857

Phone/Email: 4196687446 INFO@TIGOHIO.COM

**OH**

# Agency Scorecard

## 1285017, TRENT INSURANCE GROUP INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $10,940 | 62.1% | 11.5% | $10,940 | 62.1% | $0 | 0.0% | 8 | 33.3% | 100.0% | $1,368 | 10/31/2025 |
| | Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $6,551 | -15.8% | 21.6% | $6,062 | -22.1% | $0 | -100.0% | 8 | -11.1% | 88.9% | $819 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Off-Road Veh | $463 | -52.6% | -4.7% | $463 | -13.8% | $0 | -100.0% | 2 | 0.0% | 100.0% | $232 | 10/31/2025 |
| | Rental M.H. | $827 | 2.1% | 20.8% | $827 | 2.1% | $827 | 2.1% | 1 | 0.0% | 100.0% | $827 | 10/31/2025 |
| | Travel Trailer | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$18,781** | **15.1%** | **16.1%** | **$18,292** | **15.2%** | **$827** | **-56.6%** | **19** | **5.6%** | **95.0%** | **$988** | |
| **Total** | **Total** | **$18,781** | **15.1%** | **16.1%** | **$18,292** | **15.2%** | **$827** | **-56.6%** | **19** | **5.6%** | **95.0%** | **$988** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 3 | 0 | $0 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **3** | **0** | **$0** | **3** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 8 | 2 | $3,444 | 7 | 2 | $3,444 | 0.29 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **12** | **2** | **$3,444** | **11** | **2** | **3,444** | **0.18** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **15** | **2** | **$3,444** | **14** | **2** | **3,444** | **0.14** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: SUB

LBE UPN:1285008

1285008

TRENT INSURANCE GROUP INC

Address: 114 W HERRICK AVE

WELLINGTON OH 44090

Phone/Email: 4406474639 INFO@TIGOHIO.COM

**OH**

# Agency Scorecard

## 1285018, TRENT INSURANCE GROUP INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $3,564 | -1.1% | 1.0% | $3,564 | -1.1% | $0 | 0.0% | 1 | 0.0% | 100.0% | $3,564 | 10/31/2025 |
| | **Total** | **$3,564** | **-1.1%** | **1.0%** | **$3,564** | **-1.1%** | **$0** | **0.0%** | **1** | **0.0%** | **100.0%** | **$3,564** | |
| Foremost Choice | Dwelling Fire | $7,622 | -0.9% | 11.6% | $6,548 | 11.2% | $2,424 | 1.8% | 7 | 0.0% | 100.0% | $1,089 | 10/31/2025 |
| | Mobile Home | $4,484 | -35.2% | 20.2% | $5,361 | -12.4% | $893 | 0.0% | 5 | 0.0% | 83.3% | $897 | 10/31/2025 |
| | Rental M.H. | ($597) | -125.8% | 15.2% | ($597) | -125.8% | $0 | -100.0% | 2 | -50.0% | 50.0% | ($299) | 10/31/2025 |
| | Travel Trailer | $308 | -6.1% | 16.3% | $308 | -6.1% | $0 | 0.0% | 1 | 0.0% | 100.0% | $308 | 10/31/2025 |
| | **Total** | **$11,817** | **-31.5%** | **15.2%** | **$11,620** | **-20.7%** | **$3,317** | **-28.6%** | **15** | **-11.8%** | **83.3%** | **$788** | |
| **Total** | **Total** | **$15,381** | **-26.2%** | **12.4%** | **$15,184** | **-16.8%** | **$3,317** | **-28.6%** | **16** | **-11.1%** | **84.2%** | **$961** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 2 | 1 | $294 | 2 | 1 | $294 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **2** | **1** | **$294** | **2** | **1** | **294** | **0.50** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **2** | **1** | **$294** | **2** | **1** | **294** | **0.50** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner Portfolio Owner: Digital Segment TRENT INSURANCE GROUP INC

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100 Role: SUB Address: 143 S MARKET ST

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100 LBE UPN:1285008 SHREVE OH 44676

Annual Average Premium = This Yr R12 NWP / PIF 1285008 Phone/Email: 3305673117 INFO@TIGOHIO.COM

**OH**

# Agency Scorecard

## 1285024, TRENT INSURANCE GROUP INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $20,946 | 787.5% | 15.5% | $20,946 | 787.5% | ($528) | 0.0% | 12 | 300.0% | 80.0% | $1,746 | 10/31/2025 |
| | Home | $6,404 | 121.1% | 16.3% | $6,404 | 121.1% | $0 | 0.0% | 4 | 33.3% | 100.0% | $1,601 | 10/31/2025 |
| | Mobile Home | $10,620 | 102.2% | 26.3% | $7,931 | 113.7% | $2,141 | 9999.9% | 10 | 25.0% | 100.0% | $1,062 | 10/31/2025 |
| | Motorcycle | $91 | 0.0% | 1.0% | $91 | 0.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $91 | 10/31/2025 |
| | Rental M.H. | $499 | 7.5% | 21.0% | $499 | 7.5% | $0 | 0.0% | 1 | 0.0% | 100.0% | $499 | 10/31/2025 |
| | **Total** | **$38,560** | **248.6%** | **19.4%** | **$35,871** | **276.7%** | **$1,613** | **9999.9%** | **28** | **75.0%** | **90.3%** | **$1,377** | |
| **Total** | **Total** | **$38,560** | **248.6%** | **19.4%** | **$35,871** | **276.7%** | **$1,613** | **9999.9%** | **28** | **75.0%** | **90.3%** | **$1,377** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 30 | 12 | $22,290 | 30 | 12 | $22,290 | 0.40 | 4 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 11 | 1 | $1,291 | 11 | 1 | $1,291 | 0.09 | 5 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 6 | 2 | $3,076 | 5 | 1 | $1,029 | 0.20 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **48** | **15** | **$26,657** | **47** | **14** | **24,610** | **0.30** | **9** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **48** | **15** | **$26,657** | **47** | **14** | **24,610** | **0.30** | **9** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner Portfolio Owner: Digital Segment TRENT INSURANCE GROUP INC

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100 Role: SUB Address: 328 W HIGH ST

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100 LBE UPN:1285008 ORRVILLE OH 44667

Annual Average Premium = This Yr R12 NWP / PIF 1285008 Phone/Email: 3306830855 INFO@TIGOHIO.COM

**OH**

# Agency Scorecard

## 1285026, TRENT INSURANCE GROUP INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $7,871 | -8.5% | 12.1% | $5,483 | -7.6% | $1,371 | 32.0% | 8 | -11.1% | 88.9% | $984 | 10/31/2025 |
| | Home | $12,776 | 285.3% | 16.7% | $12,776 | 285.3% | $3,455 | 116.8% | 7 | 250.0% | 100.0% | $1,825 | 10/31/2025 |
| | Mobile Home | $11,975 | -11.6% | 20.4% | $11,119 | -3.3% | $0 | -100.0% | 11 | 0.0% | 84.6% | $1,089 | 10/31/2025 |
| | Motorcycle | $784 | 4.4% | 1.7% | $784 | 4.4% | $0 | 0.0% | 1 | 0.0% | 100.0% | $784 | 10/31/2025 |
| | Rental M.H. | $1,570 | -10.6% | 20.6% | $1,570 | -10.6% | $0 | 0.0% | 4 | 0.0% | 80.0% | $393 | 10/31/2025 |
| | **Total** | **$34,976** | **25.0%** | **17.1%** | **$31,732** | **36.4%** | **$4,826** | **21.5%** | **31** | **14.8%** | **88.6%** | **$1,128** | |
| **Total** | **Total** | **$34,976** | **25.0%** | **17.1%** | **$31,732** | **36.4%** | **$4,826** | **21.5%** | **31** | **14.8%** | **88.6%** | **$1,128** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 17 | 0 | $0 | 16 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 21 | 5 | $9,146 | 21 | 5 | $9,146 | 0.24 | 3 | 1 | $3,455 | 33.3% | 10/31/2025 |
| | Mobile Home | 10 | 2 | $1,746 | 9 | 2 | $1,746 | 0.22 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 1 | $487 | 1 | 1 | $487 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **50** | **8** | **$11,379** | **48** | **8** | **11,379** | **0.17** | **3** | **1** | **$3,455** | **33.3%** | |
| **Grand Total** | | **50** | **8** | **$11,379** | **48** | **8** | **11,379** | **0.17** | **3** | **1** | **$3,455** | **33.3%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: SUB

LBE UPN:1285008

1285008

TRENT INSURANCE GROUP INC

Address: 2260 US HIGHWAY 224

NEW HAVEN OH 44850

Phone/Email: 4199355693 INFO@TIGOHIO.COM

# Agency Scorecard

**OH**

## 1285234, ASSOCIATES INS SERVICES, LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | -100.0% | 1.0% | $0 | -100.0% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **-100.0%** | **1.0%** | **$0** | **-100.0%** | **$0** | **0.0%** | **0** | **-100.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $33,424 | -8.7% | 10.9% | $25,921 | -20.1% | $877 | -80.7% | 24 | -4.0% | 77.4% | $1,393 | 10/31/2025 |
| | Home | $19,240 | 8.8% | 16.1% | $6,055 | -60.5% | $1,688 | 75.8% | 7 | -22.2% | 63.6% | $2,749 | 10/31/2025 |
| | Marine | $179 | 1.1% | 6.2% | $179 | 1.1% | $0 | 0.0% | 1 | 0.0% | 100.0% | $179 | 10/31/2025 |
| | Mobile Home | $12,164 | 39.2% | 20.7% | $10,033 | 30.9% | $1,773 | -0.3% | 9 | 28.6% | 90.0% | $1,352 | 10/31/2025 |
| | Motorcycle | $516 | -6.5% | 2.4% | $516 | -6.5% | $0 | 0.0% | 1 | 0.0% | 100.0% | $516 | 10/31/2025 |
| | Off-Road Veh | $0 | -100.0% | -2.6% | $0 | -100.0% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $312 | 17.7% | 18.3% | $312 | 17.7% | $312 | 1.0% | 1 | 0.0% | 100.0% | $312 | 10/31/2025 |
| | Travel Trailer | $980 | 4.1% | 18.6% | $980 | 4.1% | $0 | 0.0% | 1 | 0.0% | 100.0% | $980 | 10/31/2025 |
| | **Total** | **$66,815** | **2.7%** | **13.9%** | **$43,996** | **-23.4%** | **$4,650** | **-38.7%** | **44** | **-4.3%** | **77.2%** | **$1,519** | |
| **Total** | **Total** | **$66,815** | **-3.4%** | **13.8%** | **$43,996** | **-28.5%** | **$4,650** | **-38.7%** | **44** | **-6.4%** | **75.9%** | **$1,519** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 53 | 6 | $12,301 | 48 | 5 | $8,535 | 0.10 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 8 | 2 | $2,696 | 8 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 8 | 3 | $3,000 | 6 | 3 | $3,000 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 1 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 1 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **72** | **11** | **$17,997** | **63** | **8** | **11,535** | **0.13** | **2** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **72** | **11** | **$17,997** | **63** | **8** | **11,535** | **0.13** | **2** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1285234

ASSOCIATES INS SERVICES, LLC

Address: 545 METRO PL S STE 250

DUBLIN OH 43017

Phone/Email: 6148890701 INFO@PROTECTALLINSURANCE.COM

# Agency Scorecard

**OH**

## 1285252, ASSOCIATES INSURANCE SERVICES, LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Mobile Home | $723 | -0.3% | 21.0% | $723 | -0.3% | $0 | 0.0% | 1 | 0.0% | 100.0% | $723 | 10/31/2025 |
| | **Total** | **$723** | **-0.3%** | **21.0%** | **$723** | **-0.3%** | **$0** | **0.0%** | **1** | **0.0%** | **100.0%** | **$723** | |
| **Total** | **Total** | **$723** | **-0.3%** | **21.0%** | **$723** | **-0.3%** | **$0** | **0.0%** | **1** | **0.0%** | **100.0%** | **$723** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Terminated Accounts

Role: SUB

LBE UPN:1285234

1285234

ASSOCIATES INSURANCE SERVICES, LLC

Address: 94 NICOLE DR

WESTERVILLE OH 43081

Phone/Email: 6148823030 INFO@ALLINSURANCE4U.COM

**OH**

# Agency Scorecard

## 1285959, PLATT INSURANCE GROUP LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | -100.0% | 999.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **-100.0%** | **999.0%** | **$0** | **-100.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $77,823 | -3.2% | 103.6% | $70,865 | 0.7% | $10,896 | -2.8% | 74 | -9.8% | 77.1% | $1,052 | 10/31/2025 |
| | Home | $5,883 | 270.7% | 14.5% | $5,883 | 270.7% | $0 | 0.0% | 3 | 200.0% | 100.0% | $1,961 | 10/31/2025 |
| | Mobile Home | $48,283 | 4.6% | 26.5% | $40,996 | 7.5% | $3,049 | 8.6% | 45 | 2.3% | 88.2% | $1,073 | 10/31/2025 |
| | Motorcycle | $1,078 | 9999.9% | 10.9% | $1,078 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 0.0% | $1,078 | 10/31/2025 |
| | Off-Road Veh | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $4,535 | 15.4% | 22.8% | $4,146 | 5.5% | $0 | -100.0% | 5 | -16.7% | 71.4% | $907 | 10/31/2025 |
| | Travel Trailer | $2,707 | -1.5% | 15.6% | $2,707 | -1.5% | $0 | -100.0% | 3 | 0.0% | 100.0% | $902 | 10/31/2025 |
| | **Total** | **$140,309** | **4.1%** | **69.5%** | **$125,675** | **7.6%** | **$13,945** | **-6.3%** | **131** | **-3.7%** | **81.9%** | **$1,071** | |
| **Total** | **Total** | **$140,309** | **3.5%** | **69.6%** | **$125,675** | **7.8%** | **$13,945** | **-6.3%** | **131** | **-3.7%** | **81.9%** | **$1,071** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 60 | 14 | $19,849 | 50 | 13 | $17,610 | 0.26 | 2 | 2 | $5,090 | 100.0% | 10/31/2025 |
| | Home | 19 | 2 | $4,303 | 19 | 2 | $4,303 | 0.11 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 18 | 7 | $4,829 | 16 | 5 | $3,580 | 0.31 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 1 | $1,685 | 1 | 1 | $1,685 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **101** | **24** | **$30,666** | **89** | **21** | **27,178** | **0.24** | **5** | **2** | **$5,090** | **40.0%** | |
| **Grand Total** | | **101** | **24** | **$30,666** | **89** | **21** | **27,178** | **0.24** | **5** | **2** | **$5,090** | **40.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1285959

PLATT INSURANCE GROUP LLC

Address: 389 NILES CORTLAND RD NE

WARREN OH 44484

Phone/Email: 3308566244 INFO@PLATTINSURANCE.COM

**OH**

# Agency Scorecard

## 1287026, DAPRILE INSURANCE GROUP LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $39,314 | 43.1% | 12.8% | $37,820 | 51.2% | $8,283 | 11.1% | 35 | 20.7% | 79.5% | $1,123 | 10/31/2025 |
| | Home | $702 | 2.6% | 15.2% | $702 | 2.6% | $0 | 0.0% | 1 | 0.0% | 100.0% | $702 | 10/31/2025 |
| | Mobile Home | $34,509 | 14.1% | 20.9% | $32,186 | 6.5% | $3,208 | -11.5% | 30 | 11.1% | 96.8% | $1,150 | 10/31/2025 |
| | Off-Road Veh | $609 | -8.1% | 0.2% | $0 | 0.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $609 | 10/31/2025 |
| | Rental M.H. | $711 | -4.8% | 12.1% | $517 | -30.8% | $0 | -100.0% | 2 | 0.0% | 100.0% | $356 | 10/31/2025 |
| | Travel Trailer | $773 | 51.3% | 15.7% | $773 | 51.3% | $0 | 0.0% | 3 | 50.0% | 100.0% | $258 | 10/31/2025 |
| | **Total** | **$76,618** | **27.0%** | **16.6%** | **$71,998** | **25.9%** | **$11,491** | **6.1%** | **72** | **16.1%** | **87.8%** | **$1,064** | |
| **Total** | **Total** | **$76,618** | **27.0%** | **16.6%** | **$71,998** | **25.9%** | **$11,491** | **6.1%** | **72** | **16.1%** | **87.8%** | **$1,064** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 44 | 15 | $20,722 | 44 | 15 | $20,722 | 0.34 | 4 | 2 | $4,920 | 50.0% | 10/31/2025 |
| | Home | 1 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 5 | 4 | $3,173 | 5 | 4 | $3,173 | 0.80 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 2 | 1 | $145 | 2 | 1 | $145 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **53** | **20** | **$24,040** | **52** | **20** | **24,040** | **0.38** | **4** | **2** | **$4,920** | **50.0%** | |
| **Grand Total** | | **53** | **20** | **$24,040** | **52** | **20** | **24,040** | **0.38** | **4** | **2** | **$4,920** | **50.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Brendan O'Connell

Role: LBE

LBE UPN:1287026

DAPRILE INSURANCE GROUP LLC

Address: 3050 ELM RD NE STE 3

WARREN OH 44483

Phone/Email: 3303955200 TONY@DAPRILEINSURANCEGROUP.COM

**OH**

# Agency Scorecard

## 1287030, DAPRILE INSURANCE GROUP LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $7,790 | -12.1% | 10.5% | $7,114 | -19.7% | $1,423 | 1.6% | 8 | -20.0% | 80.0% | $974 | 10/31/2025 |
| | Mobile Home | $7,441 | -25.5% | 19.8% | $6,975 | -26.9% | $0 | 0.0% | 7 | -22.2% | 77.8% | $1,063 | 10/31/2025 |
| | Rental M.H. | $467 | 5.2% | 20.7% | $467 | 5.2% | $0 | 0.0% | 1 | 0.0% | 100.0% | $467 | 10/31/2025 |
| | Travel Trailer | $611 | -5.7% | 16.3% | $611 | -5.7% | $0 | 0.0% | 1 | 0.0% | 100.0% | $611 | 10/31/2025 |
| | **Total** | **$16,309** | **-18.2%** | **15.4%** | **$15,167** | **-22.2%** | **$1,423** | **1.6%** | **17** | **-19.0%** | **81.0%** | **$959** | |
| **Total** | **Total** | **$16,309** | **-18.2%** | **15.4%** | **$15,167** | **-22.2%** | **$1,423** | **1.6%** | **17** | **-19.0%** | **81.0%** | **$959** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: SUB

LBE UPN:1287026

1287026

DAPRILE INSURANCE GROUP LLC

Address: 10466 MAIN ST

NEW MIDDLETOWN OH 44442

Phone/Email: 3305422211 TONY@DAPRILEINSURANCEGROUP.COM

**OH**

# Agency Scorecard

## 1287865, DAN COONFARE AGENCY LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $26,259 | 16.1% | 16.5% | $22,747 | 19.1% | ($1,502) | 0.0% | 21 | 10.5% | 75.0% | $1,250 | 10/31/2025 |
| | Home | ($628) | -145.2% | -43.5% | ($628) | -145.2% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$25,631** | **6.8%** | **16.2%** | **$22,119** | **8.0%** | **($1,502)** | **0.0%** | **21** | **5.0%** | **72.4%** | **$1,221** | |
| **Total** | **Total** | **$25,631** | **6.8%** | **16.2%** | **$22,119** | **8.0%** | **($1,502)** | **0.0%** | **21** | **5.0%** | **72.4%** | **$1,221** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | 15 | 9 | $17,045 | 15 | 9 | $17,045 | 0.60 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **15** | **9** | **$17,045** | **15** | **9** | **17,045** | **0.60** | **1** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **15** | **9** | **$17,045** | **15** | **9** | **17,045** | **0.60** | **1** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1287865

DAN COONFARE AGENCY LLC

Address: 1080 FISHINGER RD

COLUMBUS OH 43221

Phone/Email: 6144865400 CONTACT@COONFAREINSURANCE.COM

OH

# Agency Scorecard

## 1287936, CAPRETTA INSURANCE AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $48,479 | 30.7% | 54.1% | $44,300 | 41.7% | $157 | -89.5% | 37 | 12.1% | 88.1% | $1,310 | 10/31/2025 |
| | Home | $15,420 | 190.6% | 14.5% | $11,480 | 116.4% | $2,984 | 9999.9% | 7 | 133.3% | 100.0% | $2,203 | 10/31/2025 |
| | Mobile Home | $2,611 | 11.4% | 20.6% | $2,228 | 13.0% | $0 | -100.0% | 5 | 0.0% | 100.0% | $522 | 10/31/2025 |
| | Rental M.H. | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Travel Trailer | $312 | -3.4% | 16.4% | $0 | 0.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $312 | 10/31/2025 |
| | **Total** | **$66,822** | **48.1%** | **44.9%** | **$58,008** | **50.3%** | **$3,141** | **64.9%** | **50** | **19.0%** | **90.9%** | **$1,336** | |
| **Total** | **Total** | **$66,822** | **48.1%** | **44.9%** | **$58,008** | **50.3%** | **$3,141** | **64.9%** | **50** | **19.0%** | **90.9%** | **$1,336** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **1** | **0** | **$0** | **1** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 39 | 9 | $20,752 | 33 | 9 | $20,752 | 0.27 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 10 | 4 | $7,425 | 7 | 2 | $4,666 | 0.29 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **50** | **13** | **$28,177** | **41** | **11** | **25,418** | **0.27** | **2** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **51** | **13** | **$28,177** | **42** | **11** | **25,418** | **0.26** | **2** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Brendan O'Connell

Role: LBE

LBE UPN:1287936

CAPRETTA INSURANCE AGENCY INC

Address: 5689 PEARL RD

PARMA OH 44129

Phone/Email: 4408883113 ALBERT@CAPRETTAINSURANCE.COM

# Agency Scorecard

**OH**

## 1287947, BOB STOUT INSURANCE AGENCY LTD

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $3,516 | 31.3% | 9.1% | $761 | -61.5% | $0 | 0.0% | 3 | 0.0% | 75.0% | $1,172 | 10/31/2025 |
| | Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Marine | $161 | 0.0% | 2.2% | $161 | 0.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $161 | 10/31/2025 |
| | Mobile Home | $9,616 | 21.9% | 18.7% | $9,616 | 21.9% | $319 | 0.0% | 12 | 33.3% | 80.0% | $801 | 10/31/2025 |
| | Motorcycle | $96 | -11.9% | 6.3% | $96 | -11.9% | $0 | 0.0% | 1 | 0.0% | 100.0% | $96 | 10/31/2025 |
| | Off-Road Veh | $75 | 0.0% | 1.7% | $75 | 0.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $75 | 10/31/2025 |
| | Other | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $2,303 | 127.6% | 22.9% | $2,303 | 127.6% | $534 | 1.7% | 3 | 50.0% | 100.0% | $768 | 10/31/2025 |
| | **Total** | **$15,767** | **32.3%** | **16.8%** | **$13,012** | **15.9%** | **$853** | **1.1%** | **21** | **23.5%** | **84.0%** | **$751** | |
| **Total** | **Total** | **$15,767** | **32.3%** | **16.8%** | **$13,012** | **15.9%** | **$853** | **1.1%** | **21** | **23.5%** | **84.0%** | **$751** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | 17 | 1 | $1,607 | 14 | 1 | $1,607 | 0.07 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 10 | 6 | $2,889 | 10 | 6 | $2,889 | 0.60 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Other | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 1 | $1,249 | 1 | 1 | $1,249 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **28** | **8** | **$5,745** | **25** | **8** | **5,745** | **0.32** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **28** | **8** | **$5,745** | **25** | **8** | **5,745** | **0.32** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1287947

BOB STOUT INSURANCE AGENCY LTD

Address: 1045 N MAIN ST STE 4

BOWLING GREEN OH 43402

Phone/Email: 4193533000 BOBSTOUTINS@OUTLOOK.COM

# Agency Scorecard

**OH**

## 1288922, HARLOW INSURANCE, LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $36,110 | 83.2% | 12.7% | $30,082 | 65.7% | $10,483 | 142.7% | 27 | 58.8% | 93.1% | $1,337 | 10/31/2025 |
| | Home | $9,153 | -11.7% | 12.6% | $9,153 | 1.3% | $1,158 | -18.6% | 7 | 16.7% | 100.0% | $1,308 | 10/31/2025 |
| | Marine | $221 | -9.8% | 13.3% | $221 | -9.8% | $0 | 0.0% | 1 | 0.0% | 100.0% | $221 | 10/31/2025 |
| | Mobile Home | $6,603 | -30.4% | 20.5% | $6,603 | -26.2% | $1,082 | -33.3% | 7 | -22.2% | 77.8% | $943 | 10/31/2025 |
| | Rental M.H. | $1,812 | -13.8% | 21.0% | $1,812 | 2.5% | $792 | 1.7% | 4 | 0.0% | 100.0% | $453 | 10/31/2025 |
| | **Total** | **$53,899** | **28.6%** | **14.5%** | **$47,871** | **25.5%** | **$13,515** | **66.0%** | **46** | **24.3%** | **92.0%** | **$1,172** | |
| **Total** | **Total** | **$53,899** | **28.6%** | **14.5%** | **$47,871** | **25.5%** | **$13,515** | **66.0%** | **46** | **24.3%** | **92.0%** | **$1,172** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 24 | 12 | $14,020 | 19 | 7 | $8,255 | 0.37 | 4 | 2 | $2,664 | 50.0% | 10/31/2025 |
| | Home | 5 | 1 | $1,308 | 4 | 1 | $1,308 | 0.25 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **29** | **13** | **$15,328** | **23** | **8** | **9,563** | **0.35** | **5** | **2** | **$2,664** | **40.0%** | |
| **Grand Total** | | **29** | **13** | **$15,328** | **23** | **8** | **9,563** | **0.35** | **5** | **2** | **$2,664** | **40.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1288922

HARLOW INSURANCE, LLC

Address: 848 S 30TH ST

HEATH OH 43056

Phone/Email: 7405221525 BOB@HARLOWINSAGENCY.COM

**OH**

# Agency Scorecard

## 1289152, AMERICA'S TRUSTED INSURANCE GROUP LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $9,611 | -53.3% | 9.6% | $7,986 | -53.1% | ($1,865) | -242.6% | 13 | -18.8% | 81.3% | $739 | 10/31/2025 |
| | Home | $1,211 | 9999.9% | 0.0% | $1,211 | 9999.9% | $1,211 | 9999.9% | 1 | 9999.9% | 100.0% | $1,211 | 10/31/2025 |
| | Mobile Home | $8,332 | 21.2% | 20.4% | $6,200 | 26.9% | $0 | -100.0% | 9 | 28.6% | 100.0% | $926 | 10/31/2025 |
| | Rental M.H. | $1,292 | 6.3% | 20.9% | $254 | 1.2% | $0 | 0.0% | 2 | 0.0% | 100.0% | $646 | 10/31/2025 |
| | **Total** | **$20,446** | **-28.7%** | **12.9%** | **$15,651** | **-29.3%** | **($654)** | **-645.0%** | **25** | **0.0%** | **89.3%** | **$818** | |
| **Total** | **Total** | **$20,446** | **-28.7%** | **12.9%** | **$15,651** | **-29.3%** | **($654)** | **-645.0%** | **25** | **0.0%** | **89.3%** | **$818** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 10 | 0 | $0 | 10 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 4 | 1 | $1,211 | 3 | 1 | $1,211 | 0.33 | 0 | 1 | $1,211 | 0.0% | 10/31/2025 |
| | Mobile Home | 7 | 2 | $1,157 | 7 | 2 | $1,157 | 0.29 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **21** | **3** | **$2,368** | **20** | **3** | **2,368** | **0.15** | **1** | **1** | **$1,211** | **100.0%** | |
| **Grand Total** | | **21** | **3** | **$2,368** | **20** | **3** | **2,368** | **0.15** | **1** | **1** | **$1,211** | **100.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Brendan O'Connell

Role: LBE

LBE UPN:1289152

AMERICA'S TRUSTED INSURANCE GROUP LLC

Address: 263 W 5TH ST

MARYSVILLE OH 43040

Phone/Email: 8594420123 SERVICE@MYATIG.COM

**OH**

# Agency Scorecard

## 1289176, NAPOLES INSURANCE SERVICES LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **-100.0%** | **0.0%** | **$0** | **-100.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $42,106 | -2.2% | 14.0% | $24,232 | -42.2% | $2,987 | -72.4% | 27 | 3.8% | 69.2% | $1,559 | 10/31/2025 |
| | Home | $3,546 | 97.3% | 26.2% | $3,546 | 97.3% | $0 | 0.0% | 2 | 100.0% | 66.7% | $1,773 | 10/31/2025 |
| | Mobile Home | $1,186 | 6.5% | 20.1% | $1,186 | 84.4% | $0 | 0.0% | 2 | 100.0% | 100.0% | $593 | 10/31/2025 |
| | Rental M.H. | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$46,838** | **1.9%** | **14.9%** | **$28,964** | **-34.8%** | **$2,987** | **-72.4%** | **31** | **10.7%** | **68.9%** | **$1,511** | |
| **Total** | **Total** | **$46,838** | **1.8%** | **14.9%** | **$28,964** | **-34.8%** | **$2,987** | **-72.4%** | **31** | **10.7%** | **68.9%** | **$1,511** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 157 | 0 | $0 | 131 | 0 | $0 | 0.00 | 13 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **157** | **0** | **$0** | **131** | **0** | **0** | **0.00** | **13** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 36 | 13 | $25,748 | 30 | 12 | $21,541 | 0.40 | 5 | 1 | $786 | 20.0% | 10/31/2025 |
| | Home | 12 | 2 | $2,486 | 9 | 2 | $2,486 | 0.22 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 4 | 1 | $469 | 4 | 1 | $469 | 0.25 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 1 | $651 | 1 | 1 | $651 | 1.00 | 0 | 1 | $651 | 0.0% | 10/31/2025 |
| | **Total** | **53** | **17** | **$29,354** | **44** | **16** | **25,147** | **0.36** | **5** | **2** | **$1,437** | **40.0%** | |
| **Grand Total** | | **210** | **17** | **$29,354** | **175** | **16** | **25,147** | **0.09** | **18** | **2** | **$1,437** | **11.1%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner
Portfolio Owner: Don Henes
Role: LBE
LBE UPN:1289176

NAPOLES INSURANCE SERVICES LLC
Address: 7811 MAD RIVER RD
DAYTON OH 45459
Phone/Email: 9372915400 NNAPOLES@NAPOLESINSURANCE.COM

**OH**

# Agency Scorecard

## 1289403, KAINE INSURANCE LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $4,964 | -52.5% | 10.4% | $5,141 | -37.6% | $1,692 | -66.0% | 6 | -25.0% | 66.7% | $827 | 10/31/2025 |
| | Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $544 | -47.6% | 21.5% | $544 | 1.7% | $0 | 0.0% | 1 | 0.0% | 100.0% | $544 | 10/31/2025 |
| | **Total** | **$5,508** | **-52.1%** | **11.2%** | **$5,685** | **-35.2%** | **$1,692** | **-66.0%** | **7** | **-22.2%** | **70.0%** | **$787** | |
| **Total** | **Total** | **$5,508** | **-52.1%** | **11.2%** | **$5,685** | **-35.2%** | **$1,692** | **-66.0%** | **7** | **-22.2%** | **70.0%** | **$787** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **1** | **0** | **$0** | **1** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 16 | 1 | $1,330 | 16 | 1 | $1,330 | 0.06 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **18** | **1** | **$1,330** | **18** | **1** | **1,330** | **0.06** | **1** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **19** | **1** | **$1,330** | **19** | **1** | **1,330** | **0.05** | **1** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Brendan O'Connell

Role: LBE

LBE UPN:1289403

KAINE INSURANCE LLC

Address: 5963 GLENWAY AVE

CINCINNATI OH 45238

Phone/Email: 5134517799 JOHN@KAINEINSURANCE.COM

**OH**

# Agency Scorecard

## 1289411, KAINE,JOHN

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Mobile Home | $0 | -100.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Travel Trailer | $1,200 | -21.4% | 16.4% | $1,200 | -21.4% | ($476) | 0.0% | 1 | -50.0% | 50.0% | $1,200 | 10/31/2025 |
| | **Total** | **$1,200** | **-1619.0%** | **16.3%** | **$1,200** | **-21.4%** | **($476)** | **0.0%** | **1** | **-50.0%** | **50.0%** | **$1,200** | |
| **Total** | **Total** | **$1,200** | **-1619.0%** | **16.3%** | **$1,200** | **-21.4%** | **($476)** | **0.0%** | **1** | **-50.0%** | **50.0%** | **$1,200** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Brendan O'Connell

Role: SUB

LBE UPN:1289403

1289403

KAINE,JOHN

Address: 5963 GLENWAY AVE

CINCINNATI OH 45238

Phone/Email: 5134517799 JOHN@KAINEINSURANCE.COM

**OH**

# Agency Scorecard

## 1289613, CSI INSURANCE LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $7,454 | -8.0% | 82.6% | $6,287 | -9.7% | ($3,184) | 0.0% | 5 | 25.0% | 62.5% | $1,491 | 10/31/2025 |
| | Home | $5,528 | 23.9% | 15.0% | $4,439 | -0.5% | $0 | 0.0% | 3 | 0.0% | 75.0% | $1,843 | 10/31/2025 |
| | Mobile Home | $828 | 9.4% | 26.0% | $828 | 9.4% | $0 | 0.0% | 1 | 0.0% | 100.0% | $828 | 10/31/2025 |
| | Rental M.H. | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Travel Trailer | $532 | 1.1% | 18.9% | $532 | 1.1% | $0 | 0.0% | 1 | 0.0% | 100.0% | $532 | 10/31/2025 |
| | **Total** | **$14,342** | **-0.9%** | **53.0%** | **$12,086** | **-9.3%** | **($3,184)** | **0.0%** | **10** | **11.1%** | **71.4%** | **$1,434** | |
| **Total** | **Total** | **$14,342** | **-0.9%** | **53.0%** | **$12,086** | **-9.3%** | **($3,184)** | **0.0%** | **10** | **11.1%** | **71.4%** | **$1,434** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 30 | 4 | $5,441 | 25 | 4 | $5,441 | 0.16 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 16 | 1 | $1,089 | 12 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **49** | **5** | **$6,530** | **40** | **4** | **5,441** | **0.10** | **3** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **49** | **5** | **$6,530** | **40** | **4** | **5,441** | **0.10** | **3** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner Portfolio Owner: Digital Segment CSI INSURANCE LLC

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100 Role: SUB Address: 225 CLEVELAND AVE

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100 LBE UPN:1281753 AMHERST OH 44001

Annual Average Premium = This Yr R12 NWP / PIF 1281753 Phone/Email: 4409842414 CHRIS.SCHIEFER@CSIINSURANCELLC.COM

**OH**

# Agency Scorecard

## 1289623, CSI INSURANCE LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| **Total** | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Terminated Accounts

Role: SUB

LBE UPN:1281753

1281753

CSI INSURANCE LLC

Address: 805 HARDING WAY W

GALION OH 44833

Phone/Email: 4194681286 CHRIS.SCHIEFER@CSIINSURANCELLC.COM

**OH**

# Agency Scorecard

## 1289635, CSI INSURANCE LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| **Total** | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Terminated Accounts

Role: SUB

LBE UPN:1281753

1281753

CSI INSURANCE LLC

Address: 617 N COUNTYLINE ST

FOSTORIA OH 44830

Phone/Email: 4194355500 CHRIS.SCHIEFER@CSIINSURANCELLC.COM

**OH**

# Agency Scorecard

## 1290827, JILL E CLINGER AGENCY LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 999.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **999.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $11,627 | 28.6% | 12.9% | $10,998 | 64.0% | $1,790 | 3.8% | 9 | 50.0% | 100.0% | $1,292 | 10/31/2025 |
| | Home | $6,844 | 216.7% | 15.2% | $6,844 | 908.0% | $0 | 0.0% | 4 | 300.0% | 100.0% | $1,711 | 10/31/2025 |
| | Mobile Home | $13,449 | -11.4% | 30.6% | $9,746 | -13.5% | $84 | -88.6% | 16 | -20.0% | 76.2% | $841 | 10/31/2025 |
| | Motor Home | $1,460 | 17.7% | 46.4% | $1,460 | 17.7% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,460 | 10/31/2025 |
| | Motorcycle | $309 | 9999.9% | 255.7% | $309 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $309 | 10/31/2025 |
| | Off-Road Veh | ($152) | -127.7% | -23.2% | ($152) | -127.7% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $1,482 | 48.5% | 22.0% | $1,482 | 48.5% | $212 | 1.0% | 4 | 33.3% | 80.0% | $371 | 10/31/2025 |
| | Travel Trailer | $1,711 | 127.2% | 17.6% | $1,711 | 127.2% | $0 | 0.0% | 4 | 100.0% | 100.0% | $428 | 10/31/2025 |
| | **Total** | **$36,730** | **22.8%** | **24.3%** | **$32,398** | **46.0%** | **$2,086** | **-21.9%** | **39** | **14.7%** | **84.8%** | **$942** | |
| **Total** | **Total** | **$36,730** | **22.8%** | **24.3%** | **$32,398** | **46.0%** | **$2,086** | **-21.9%** | **39** | **14.7%** | **84.8%** | **$942** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **1** | **0** | **$0** | **1** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 9 | 3 | $4,120 | 9 | 3 | $4,120 | 0.33 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 24 | 3 | $4,992 | 23 | 3 | $4,992 | 0.13 | 4 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 5 | 1 | $724 | 5 | 1 | $724 | 0.20 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 3 | 1 | $309 | 3 | 1 | $309 | 0.33 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 3 | 2 | $1,100 | 3 | 2 | $1,100 | 0.67 | 1 | 1 | $630 | 100.0% | 10/31/2025 |
| | Travel Trailer | 4 | 2 | $996 | 3 | 2 | $996 | 0.67 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **50** | **12** | **$12,241** | **48** | **12** | **12,241** | **0.25** | **6** | **1** | **$630** | **16.7%** | |
| **Grand Total** | | **51** | **12** | **$12,241** | **49** | **12** | **12,241** | **0.24** | **6** | **1** | **$630** | **16.7%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Brendan O'Connell

Role: LBE

LBE UPN:1290827

JILL E CLINGER AGENCY LLC

Address: 827 E 2ND ST

DEFIANCE OH 43512

Phone/Email: 4197843225 JILL@JILLCLINGERAGENCY.COM

**OH**

# Agency Scorecard

## 1292496, GRAVES COSBY SELLMAN INSURANCE AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $41,593 | 88.0% | 15.7% | $40,858 | 79.2% | $2,240 | -62.8% | 26 | 23.8% | 55.3% | $1,600 | 10/31/2025 |
| | Home | $9,208 | 273.2% | 14.9% | $9,208 | 273.2% | $0 | 0.0% | 6 | 200.0% | 85.7% | $1,535 | 10/31/2025 |
| | Mobile Home | $12,588 | 12.5% | 19.9% | $11,867 | 13.8% | $3,153 | 616.6% | 9 | -18.2% | 81.8% | $1,399 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$63,389** | **79.2%** | **16.5%** | **$61,933** | **75.5%** | **$5,393** | **-16.5%** | **41** | **20.6%** | **63.1%** | **$1,546** | |
| **Total** | **Total** | **$63,389** | **79.2%** | **16.5%** | **$61,933** | **75.5%** | **$5,393** | **-16.5%** | **41** | **20.6%** | **63.1%** | **$1,546** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **1** | **0** | **$0** | **1** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 53 | 26 | $46,698 | 49 | 25 | $45,963 | 0.51 | 4 | 2 | $1,949 | 50.0% | 10/31/2025 |
| | Home | 23 | 5 | $7,290 | 20 | 5 | $7,290 | 0.25 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 4 | 0 | $0 | 3 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **80** | **31** | **$53,988** | **72** | **30** | **53,253** | **0.42** | **6** | **2** | **$1,949** | **33.3%** | |
| **Grand Total** | | **81** | **31** | **$53,988** | **73** | **30** | **53,253** | **0.41** | **6** | **2** | **$1,949** | **33.3%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1292496

GRAVES COSBY SELLMAN INSURANCE AGENCY INC

Address: 38 MONUMENT SQ

URBANA OH 43078

Phone/Email: 9376531360 JAMON@SELLMANINS.COM

**OH**

# Agency Scorecard

## 1295710, RINKES INS LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $1,939 | -30.4% | 10.8% | $860 | -50.4% | $0 | 0.0% | 2 | -33.3% | 66.7% | $970 | 10/31/2025 |
| | Home | $2,624 | 2.3% | 13.2% | $2,624 | 2.3% | $0 | 0.0% | 1 | 0.0% | 100.0% | $2,624 | 10/31/2025 |
| | Marine | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $10,992 | 1.1% | 21.5% | $10,992 | 1.1% | $0 | 0.0% | 8 | 0.0% | 100.0% | $1,374 | 10/31/2025 |
| | Rental M.H. | $900 | -9.1% | 20.6% | $634 | -36.0% | $0 | 0.0% | 2 | 0.0% | 66.7% | $450 | 10/31/2025 |
| | **Total** | **$16,455** | **-4.4%** | **18.6%** | **$15,110** | **-6.5%** | **$0** | **0.0%** | **13** | **-7.1%** | **86.7%** | **$1,266** | |
| **Total** | **Total** | **$16,455** | **-4.4%** | **18.6%** | **$15,110** | **-6.5%** | **$0** | **0.0%** | **13** | **-7.1%** | **86.7%** | **$1,266** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 1 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 2 | 1 | $266 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **5** | **1** | **$266** | **2** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **5** | **1** | **$266** | **2** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1295710

RINKES INS LLC

Address: 1115 CANTON RD NW STE A

CARROLLTON OH 44615

Phone/Email: 3306274442 RINKES242@GMAIL.COM

**OH**

# Agency Scorecard

## 1295725, LANCE MEINERS INSURANCE AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | ($795) | -114.0% | 1.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **($795)** | **-114.0%** | **1.0%** | **$0** | **-100.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $42,974 | 41.0% | 21.4% | $37,316 | 45.6% | $2,817 | -46.0% | 28 | 86.7% | 96.6% | $1,535 | 10/31/2025 |
| | Home | $29,011 | 183.9% | 14.7% | $27,922 | 250.9% | $1,351 | 9999.9% | 19 | 216.7% | 90.5% | $1,527 | 10/31/2025 |
| | Mobile Home | $5,327 | 61.4% | 21.4% | $5,327 | 61.4% | $0 | 0.0% | 3 | 50.0% | 100.0% | $1,776 | 10/31/2025 |
| | **Total** | **$77,312** | **75.7%** | **19.5%** | **$70,565** | **91.3%** | **$4,168** | **-20.0%** | **50** | **117.4%** | **94.3%** | **$1,546** | |
| **Total** | **Total** | **$76,517** | **54.0%** | **19.8%** | **$70,565** | **65.8%** | **$4,168** | **-20.0%** | **50** | **117.4%** | **94.3%** | **$1,530** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 59 | 14 | $21,693 | 55 | 13 | $20,104 | 0.24 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 58 | 15 | $19,400 | 50 | 14 | $18,311 | 0.28 | 9 | 1 | $1,351 | 11.1% | 10/31/2025 |
| | Mobile Home | 1 | 1 | $1,506 | 1 | 1 | $1,506 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **118** | **30** | **$42,599** | **106** | **28** | **39,921** | **0.26** | **11** | **1** | **$1,351** | **9.1%** | |
| **Grand Total** | | **118** | **30** | **$42,599** | **106** | **28** | **39,921** | **0.26** | **11** | **1** | **$1,351** | **9.1%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Brendan O'Connell

Role: LBE

LBE UPN:1295725

LANCE MEINERS INSURANCE AGENCY INC

Address: 152 LEAR RD

AVON LAKE OH 44012

Phone/Email: 4409336277 LANCE@MEINERSINSURANCE.COM

**OH**

# Agency Scorecard

## 1297620, URBANIA INS AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $24,455 | 7.7% | 11.0% | $22,414 | -3.9% | $274 | 9999.9% | 15 | -6.3% | 71.4% | $1,630 | 10/31/2025 |
| | Home | $9,052 | 32.0% | 12.8% | $7,722 | 12.6% | $0 | 0.0% | 5 | 25.0% | 100.0% | $1,810 | 10/31/2025 |
| | Marine | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $5,957 | -19.2% | 60.7% | $5,957 | -19.2% | $754 | -51.5% | 6 | -33.3% | 66.7% | $993 | 10/31/2025 |
| | Motor Home | $116 | -93.3% | 6.6% | $116 | -93.3% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $91 | 30.0% | -3.0% | $91 | 30.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $91 | 10/31/2025 |
| | Off-Road Veh | $0 | -100.0% | -7.0% | $0 | -100.0% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $2,831 | -1.9% | 20.7% | $876 | -69.7% | $0 | 0.0% | 2 | -33.3% | 66.7% | $1,416 | 10/31/2025 |
| | Travel Trailer | $383 | -2.5% | 16.4% | $383 | -2.5% | $0 | 0.0% | 1 | 0.0% | 100.0% | $383 | 10/31/2025 |
| | **Total** | **$42,885** | **1.7%** | **19.9%** | **$37,559** | **-12.2%** | **$1,028** | **-33.9%** | **30** | **-16.7%** | **71.4%** | **$1,430** | |
| **Total** | **Total** | **$42,885** | **1.7%** | **19.9%** | **$37,559** | **-12.2%** | **$1,028** | **-33.9%** | **30** | **-16.7%** | **71.4%** | **$1,430** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 24 | 5 | $9,585 | 21 | 4 | $7,544 | 0.19 | 3 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 12 | 1 | $1,750 | 9 | 1 | $1,750 | 0.11 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **39** | **6** | **$11,335** | **33** | **5** | **9,294** | **0.15** | **4** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **39** | **6** | **$11,335** | **33** | **5** | **9,294** | **0.15** | **4** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1297620

URBANIA INS AGENCY INC

Address: 11335 CONCORD HAMBDEN RD

CONCORD TOWNSHIP OH 44077

Phone/Email: 4409741500 KENNY@THEAGENCYCLUSTER.COM

**OH**

# Agency Scorecard

## 1297622, URBANIA INS AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $4,138 | 2.2% | 11.4% | $4,138 | 2.2% | $3,215 | 2.1% | 3 | 0.0% | 100.0% | $1,379 | 10/31/2025 |
| | Home | $1,249 | 2.1% | 10.3% | $1,249 | 2.1% | $1,249 | 2.1% | 1 | 0.0% | 100.0% | $1,249 | 10/31/2025 |
| | Mobile Home | $1,679 | -0.5% | 17.5% | $1,036 | -2.5% | $0 | 0.0% | 2 | 0.0% | 100.0% | $840 | 10/31/2025 |
| | **Total** | **$7,066** | **1.5%** | **12.5%** | **$6,423** | **1.4%** | **$4,464** | **2.1%** | **6** | **0.0%** | **100.0%** | **$1,178** | |
| **Total** | **Total** | **$7,066** | **1.5%** | **12.5%** | **$6,423** | **1.4%** | **$4,464** | **2.1%** | **6** | **0.0%** | **100.0%** | **$1,178** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: SUB

LBE UPN:1297620

1297620

URBANIA INS AGENCY INC

Address: 3937 WATERLOO RD

RANDOLPH OH 44265

Phone/Email: 3303251488 KENNY@THEAGENCYCLUSTER.COM

**OH**

# Agency Scorecard

## 1297623, URBANIA INS AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $7,910 | -11.4% | 10.8% | $7,173 | -39.4% | $832 | 2.3% | 7 | -30.0% | 70.0% | $1,130 | 10/31/2025 |
| | Home | $10,276 | 4.1% | 11.5% | $10,276 | 4.1% | $0 | 0.0% | 5 | 0.0% | 100.0% | $2,055 | 10/31/2025 |
| | Mobile Home | $2,777 | 5.0% | 21.0% | $2,288 | 5.4% | $0 | 0.0% | 3 | 0.0% | 100.0% | $926 | 10/31/2025 |
| | Rental M.H. | $427 | 4.9% | 20.9% | $427 | 4.9% | $0 | 0.0% | 1 | 0.0% | 100.0% | $427 | 10/31/2025 |
| | **Total** | **$21,390** | **-2.1%** | **12.4%** | **$20,164** | **-17.0%** | **$832** | **2.3%** | **16** | **-15.8%** | **84.2%** | **$1,337** | |
| **Total** | **Total** | **$21,390** | **-2.1%** | **12.4%** | **$20,164** | **-17.0%** | **$832** | **2.3%** | **16** | **-15.8%** | **84.2%** | **$1,337** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner Portfolio Owner: Digital Segment URBANIA INS AGENCY INC

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100 Role: SUB Address: 11335 CONCORD HAMBDEN RD

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100 LBE UPN:1297620 CONCORD TOWNSHIP OH 44077

Annual Average Premium = This Yr R12 NWP / PIF 1297620 Phone/Email: 4409741500 KENNY@THEAGENCYCLUSTER.COM

**OH**

# Agency Scorecard

## 1297624, URBANIA INS AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $1,469 | 1.7% | 11.0% | $1,469 | 1.7% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,469 | 10/31/2025 |
| | Mobile Home | $285 | 1.8% | 20.4% | $0 | 0.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $285 | 10/31/2025 |
| | Travel Trailer | $159 | 0.0% | 16.7% | $159 | 0.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $159 | 10/31/2025 |
| | **Total** | **$1,913** | **1.6%** | **12.9%** | **$1,628** | **1.6%** | **$0** | **0.0%** | **3** | **0.0%** | **100.0%** | **$638** | |
| **Total** | **Total** | **$1,913** | **1.6%** | **12.9%** | **$1,628** | **1.6%** | **$0** | **0.0%** | **3** | **0.0%** | **100.0%** | **$638** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: SUB

LBE UPN:1297620

1297620

URBANIA INS AGENCY INC

Address: 8334 WASHINGTON ST

CHAGRIN FALLS OH 44023

Phone/Email: 4405430426 KENNY@THEAGENCYCLUSTER.COM

**OH**

# Agency Scorecard

## 1297625, URBANIA INS AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $16,115 | -26.6% | 11.9% | $17,179 | -31.1% | $0 | -100.0% | 18 | -10.0% | 81.8% | $895 | 10/31/2025 |
| | Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$16,115** | **-26.6%** | **11.9%** | **$17,179** | **-31.1%** | **$0** | **-100.0%** | **18** | **-10.0%** | **81.8%** | **$895** | |
| **Total** | **Total** | **$16,115** | **-26.6%** | **11.9%** | **$17,179** | **-31.1%** | **$0** | **-100.0%** | **18** | **-10.0%** | **81.8%** | **$895** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 14 | 2 | $3,278 | 11 | 2 | $3,278 | 0.18 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **14** | **2** | **$3,278** | **11** | **2** | **3,278** | **0.18** | **1** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **14** | **2** | **$3,278** | **11** | **2** | **3,278** | **0.18** | **1** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: SUB

LBE UPN:1297620

1297620

URBANIA INS AGENCY INC

Address: 27629 CHAGRIN BLVD STE 210A

WOODMERE OH 44122

Phone/Email: 2165910010 KENNY@THEAGENCYCLUSTER.COM

# Agency Scorecard

**OH**

## 1297627, URBANIA INS AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $3,199 | 1.5% | 10.7% | $2,230 | 51.2% | $0 | 0.0% | 3 | 0.0% | 75.0% | $1,066 | 10/31/2025 |
| | **Total** | **$3,199** | **1.5%** | **10.7%** | **$2,230** | **51.2%** | **$0** | **0.0%** | **3** | **0.0%** | **75.0%** | **$1,066** | |
| **Total** | **Total** | **$3,199** | **1.5%** | **10.7%** | **$2,230** | **51.2%** | **$0** | **0.0%** | **3** | **0.0%** | **75.0%** | **$1,066** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 2 | 1 | $920 | 2 | 1 | $920 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **2** | **1** | **$920** | **2** | **1** | **920** | **0.50** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **2** | **1** | **$920** | **2** | **1** | **920** | **0.50** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: SUB

LBE UPN:1297620

1297620

URBANIA INS AGENCY INC

Address: 670 S GREEN RD

SOUTH EUCLID OH 44121

Phone/Email: 2163818085 KENNY@THEAGENCYCLUSTER.COM

OH

# Agency Scorecard

## 1306055, LEE A BROWN INSURANCE AGY LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $39,899 | 15.5% | 286.8% | $17,764 | 14.9% | $1,454 | -14.6% | 23 | 4.5% | 88.5% | $1,735 | 10/31/2025 |
| | Home | $3,396 | 4.9% | 11.9% | $3,396 | 4.9% | $0 | 0.0% | 2 | 0.0% | 100.0% | $1,698 | 10/31/2025 |
| | Mobile Home | $13,461 | -32.0% | 19.2% | $8,799 | -42.8% | ($4,036) | 0.0% | 12 | -33.3% | 60.0% | $1,122 | 10/31/2025 |
| | Motorcycle | $372 | -2.6% | 2.6% | $372 | -2.6% | $0 | 0.0% | 1 | 0.0% | 100.0% | $372 | 10/31/2025 |
| | Rental M.H. | $2,449 | -17.1% | 20.1% | $2,449 | -1.1% | $518 | 1.8% | 5 | 0.0% | 100.0% | $490 | 10/31/2025 |
| | Travel Trailer | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$59,577** | **-2.2%** | **181.4%** | **$32,780** | **-11.3%** | **($2,064)** | **-193.4%** | **43** | **-10.4%** | **79.6%** | **$1,386** | |
| **Total** | **Total** | **$59,577** | **-2.2%** | **181.4%** | **$32,780** | **-11.3%** | **($2,064)** | **-193.4%** | **43** | **-10.4%** | **79.6%** | **$1,386** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | 11 | 4 | $3,714 | 7 | 2 | $2,254 | 0.29 | 3 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 5 | 2 | $1,004 | 5 | 2 | $1,004 | 0.40 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **18** | **6** | **$4,718** | **14** | **4** | **3,258** | **0.29** | **4** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **18** | **6** | **$4,718** | **14** | **4** | **3,258** | **0.29** | **4** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1306055

LEE A BROWN INSURANCE AGY LLC

Address: 1696 EAST PIKE

ZANESVILLE OH 43701

Phone/Email: 7404500001 LEE@LEEBROWNINSURANCE.COM

# Agency Scorecard

**OH**

**1309345, MARSTON,MARK R**

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $69,368 | 17.4% | 12.3% | $54,178 | 9.2% | $6,161 | 4.8% | 57 | 9.6% | 82.6% | $1,217 | 10/31/2025 |
| | Home | $9,852 | 90.9% | 15.3% | $9,852 | 90.9% | $1,571 | 9999.9% | 5 | 66.7% | 71.4% | $1,970 | 10/31/2025 |
| | Mobile Home | $30,534 | 8.9% | 20.7% | $24,706 | 9.6% | $1,096 | -0.5% | 22 | 4.8% | 100.0% | $1,388 | 10/31/2025 |
| | Rental M.H. | $918 | 4.0% | 20.8% | $582 | 3.9% | $0 | 0.0% | 3 | 0.0% | 100.0% | $306 | 10/31/2025 |
| | Travel Trailer | $1,404 | -1.7% | 19.8% | $1,404 | -1.7% | $0 | 0.0% | 2 | 0.0% | 100.0% | $702 | 10/31/2025 |
| | **Total** | **$112,076** | **18.5%** | **15.1%** | **$90,722** | **14.4%** | **$8,828** | **26.5%** | **89** | **9.9%** | **86.4%** | **$1,259** | |
| **Total** | **Total** | **$112,076** | **18.5%** | **15.1%** | **$90,722** | **14.4%** | **$8,828** | **26.5%** | **89** | **9.9%** | **86.4%** | **$1,259** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 38 | 17 | $22,894 | 32 | 13 | $15,658 | 0.41 | 3 | 2 | $1,914 | 66.7% | 10/31/2025 |
| | Home | 10 | 4 | $6,890 | 8 | 4 | $6,890 | 0.50 | 1 | 1 | $1,664 | 100.0% | 10/31/2025 |
| | Mobile Home | 9 | 1 | $1,068 | 8 | 1 | $1,068 | 0.13 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **57** | **22** | **$30,852** | **48** | **18** | **23,616** | **0.38** | **4** | **3** | **$3,578** | **75.0%** | |
| **Grand Total** | | **57** | **22** | **$30,852** | **48** | **18** | **23,616** | **0.38** | **4** | **3** | **$3,578** | **75.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner

Portfolio Owner: Brendan O'Connell

Role: LBE

LBE UPN:1309345

MARSTON,MARK R

Address: 1610 N 21ST ST

NEWARK OH 43055

Phone/Email: 7403662995 MARKMARSTON@MARSTONINSURANCE.COM

# Agency Scorecard

**OH**

## 1310274, STEVE MCDONALD INSURANCE AGENCY LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $10,838 | 86.9% | 11.5% | $9,443 | 62.8% | $1,301 | 7.7% | 7 | 40.0% | 70.0% | $1,548 | 10/31/2025 |
| | Home | $1,291 | 9999.9% | 16.9% | $1,291 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $1,291 | 10/31/2025 |
| | Mobile Home | $9,803 | 42.3% | 21.3% | $7,758 | 20.4% | $0 | -100.0% | 9 | 28.6% | 100.0% | $1,089 | 10/31/2025 |
| | Motor Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $1,048 | -13.1% | 5.7% | $1,048 | -13.1% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,048 | 10/31/2025 |
| | Travel Trailer | $2,323 | 45.2% | 18.2% | $2,323 | 45.2% | $0 | 0.0% | 2 | 0.0% | 66.7% | $1,162 | 10/31/2025 |
| | **Total** | **$25,303** | **63.3%** | **16.5%** | **$21,863** | **45.3%** | **$1,301** | **215.8%** | **20** | **33.3%** | **83.3%** | **$1,265** | |
| **Total** | **Total** | **$25,303** | **63.3%** | **16.5%** | **$21,863** | **45.3%** | **$1,301** | **215.8%** | **20** | **33.3%** | **83.3%** | **$1,265** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 19 | 5 | $8,215 | 14 | 4 | $6,395 | 0.29 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 2 | 1 | $1,291 | 2 | 1 | $1,291 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 4 | 2 | $2,240 | 3 | 2 | $2,240 | 0.67 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 1 | 1 | $1,169 | 1 | 1 | $1,169 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **27** | **9** | **$12,915** | **21** | **8** | **11,095** | **0.38** | **1** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **27** | **9** | **$12,915** | **21** | **8** | **11,095** | **0.38** | **1** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1310274

STEVE MCDONALD INSURANCE AGENCY LLC

Address: 117 E MAIN ST

HEBRON OH 43025

Phone/Email: 7409284891 MCDONAS2@SMCDONALDINS.COM

**OH**

# Agency Scorecard

## 1311256, LAMBERT,MICHAEL

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **-100.0%** | **0.0%** | **$0** | **-100.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $35,394 | 20.4% | 16.8% | $30,816 | 9.5% | $4,198 | -1.3% | 30 | -14.3% | 71.4% | $1,180 | 10/31/2025 |
| | Home | $3,763 | 15.3% | 174.8% | $3,763 | 15.3% | $0 | 0.0% | 2 | 0.0% | 100.0% | $1,882 | 10/31/2025 |
| | Mobile Home | $1,851 | -55.3% | 19.6% | $1,851 | -55.3% | $0 | 0.0% | 4 | -33.3% | 66.7% | $463 | 10/31/2025 |
| | **Total** | **$41,008** | **11.4%** | **30.5%** | **$36,430** | **2.5%** | **$4,198** | **-1.3%** | **36** | **-16.3%** | **72.0%** | **$1,139** | |
| **Total** | **Total** | **$41,008** | **8.2%** | **14.9%** | **$36,430** | **-0.5%** | **$4,198** | **-1.3%** | **36** | **-16.3%** | **72.0%** | **$1,139** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 2 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **2** | **0** | **$0** | **1** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 19 | 7 | $11,414 | 12 | 3 | $7,518 | 0.25 | 3 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 3 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **22** | **7** | **$11,414** | **14** | **3** | **7,518** | **0.21** | **3** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **24** | **7** | **$11,414** | **15** | **3** | **7,518** | **0.20** | **3** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1311256

LAMBERT,MICHAEL

Address: 6700 BETA DR STE 112

MAYFIELD VILLAGE OH 44143

Phone/Email: 4404490111 MIKE@LAMBERTAGENT.COM

**OH**

# Agency Scorecard

## 1314794, ROLLAND INSURANCE AND FINANCIAL SERVICES

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $574 | -65.0% | 10.7% | $574 | -65.0% | $0 | 0.0% | 1 | 0.0% | 50.0% | $574 | 10/31/2025 |
| | Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Marine | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $3,273 | -4.5% | 20.2% | $3,273 | 14.9% | $0 | 0.0% | 2 | 0.0% | 100.0% | $1,637 | 10/31/2025 |
| | Off-Road Veh | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Travel Trailer | $207 | -161.8% | -2.7% | $207 | -161.8% | $0 | 0.0% | 1 | 0.0% | 100.0% | $207 | 10/31/2025 |
| | **Total** | **$4,054** | **-14.3%** | **16.5%** | **$4,054** | **-2.3%** | **$0** | **0.0%** | **4** | **0.0%** | **80.0%** | **$1,014** | |
| **Total** | **Total** | **$4,054** | **-14.3%** | **16.5%** | **$4,054** | **-2.3%** | **$0** | **0.0%** | **4** | **0.0%** | **80.0%** | **$1,014** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 8 | 1 | $1,321 | 8 | 1 | $1,321 | 0.13 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 3 | 0 | $0 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **12** | **1** | **$1,321** | **12** | **1** | **1,321** | **0.08** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **12** | **1** | **$1,321** | **12** | **1** | **1,321** | **0.08** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1314794

ROLLAND INSURANCE AND FINANCIAL SERVICES

Address: 50 S LIBERTY ST STE 162

POWELL OH 43065

Phone/Email: 6143154761 BOB@ROLLANDINSURANCE.NET

**OH**

# Agency Scorecard

## 1316529, EGGLESTON INSURANCE & FINANCIAL GROUP LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $51,286 | 147.2% | 12.8% | $42,354 | 91.1% | $9,826 | 1095.4% | 20 | 42.9% | 90.9% | $2,564 | 10/31/2025 |
| | Home | $6,346 | 67.6% | 11.9% | $6,881 | 81.7% | ($199) | 0.0% | 3 | -40.0% | 42.9% | $2,115 | 10/31/2025 |
| | Marine | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $5,888 | 22.5% | 24.5% | $4,751 | 27.9% | $0 | 0.0% | 6 | 0.0% | 75.0% | $981 | 10/31/2025 |
| | Travel Trailer | $368 | -53.4% | 16.2% | $368 | -53.4% | $0 | 0.0% | 1 | -50.0% | 50.0% | $368 | 10/31/2025 |
| | **Total** | **$63,888** | **112.0%** | **14.4%** | **$54,354** | **78.5%** | **$9,627** | **1071.2%** | **30** | **11.1%** | **76.9%** | **$2,130** | |
| **Total** | **Total** | **$63,888** | **112.0%** | **14.4%** | **$54,354** | **78.5%** | **$9,627** | **1071.2%** | **30** | **11.1%** | **76.9%** | **$2,130** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 48 | 8 | $24,206 | 42 | 5 | $15,274 | 0.12 | 5 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 13 | 2 | $3,520 | 9 | 2 | $3,520 | 0.22 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 1 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 5 | 2 | $2,148 | 5 | 2 | $2,148 | 0.40 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **67** | **12** | **$29,874** | **56** | **9** | **20,942** | **0.16** | **5** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **67** | **12** | **$29,874** | **56** | **9** | **20,942** | **0.16** | **5** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Brendan O'Connell

Role: LBE

LBE UPN:1316529

EGGLESTON INSURANCE & FINANCIAL GROUP LLC

Address: 1596 STRINGTOWN RD

GROVE CITY OH 43123

Phone/Email: 6142773650 H.EGGLESTON@EGGLESTONINSURANCE.COM

# Agency Scorecard

**OH**

## 1316533, EGGLESTON INSURANCE & FINANCIAL GROUP LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $35,702 | 8.3% | 15.3% | $25,003 | -1.3% | $2,162 | 22.7% | 24 | -4.0% | 96.0% | $1,488 | 10/31/2025 |
| | Home | $6,854 | -16.1% | 8.3% | $6,854 | -11.1% | $0 | -100.0% | 3 | -25.0% | 75.0% | $2,285 | 10/31/2025 |
| | Mobile Home | $5,555 | 19.8% | 21.2% | $4,148 | 19.3% | $564 | 11.5% | 7 | 0.0% | 100.0% | $794 | 10/31/2025 |
| | **Total** | **$48,111** | **5.1%** | **14.9%** | **$36,005** | **-1.4%** | **$2,726** | **-305.1%** | **34** | **-5.6%** | **94.4%** | **$1,415** | |
| **Total** | **Total** | **$48,111** | **5.1%** | **14.9%** | **$36,005** | **-1.4%** | **$2,726** | **-305.1%** | **34** | **-5.6%** | **94.4%** | **$1,415** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | 6 | 0 | $0 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **6** | **0** | **$0** | **3** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **6** | **0** | **$0** | **3** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: SUB

LBE UPN:1316529

1316529

EGGLESTON INSURANCE & FINANCIAL GROUP LLC

Address: 4760 W BROAD ST

COLUMBUS OH 43228

Phone/Email: 6142780278 H.EGGLESTON@EGGLESTONINSURANCE.COM

**OH**

# Agency Scorecard

## 1318008, RUFF & ASSOC INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $12,290 | 471.6% | 13.2% | $9,324 | 1905.2% | $6,391 | 1274.4% | 8 | 300.0% | 88.9% | $1,536 | 10/31/2025 |
| | Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $22,047 | 20.5% | 114.9% | $16,876 | 6.1% | $0 | 0.0% | 16 | 6.7% | 94.1% | $1,378 | 10/31/2025 |
| | Motor Home | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $3,916 | -14.2% | -0.1% | $4,233 | -17.9% | $0 | -100.0% | 9 | -18.2% | 64.3% | $435 | 10/31/2025 |
| | Off-Road Veh | $840 | -5.9% | 1.2% | $840 | -5.9% | $0 | 0.0% | 1 | 0.0% | 100.0% | $840 | 10/31/2025 |
| | Rental M.H. | $4,198 | 41.0% | 21.4% | $3,998 | 34.3% | $0 | 0.0% | 4 | 0.0% | 80.0% | $1,050 | 10/31/2025 |
| | Travel Trailer | $2,920 | 17.6% | 19.1% | $2,920 | 17.6% | $0 | -100.0% | 2 | 0.0% | 100.0% | $1,460 | 10/31/2025 |
| | **Total** | **$46,211** | **43.0%** | **69.3%** | **$38,191** | **32.5%** | **$6,391** | **396.6%** | **40** | **14.3%** | **83.3%** | **$1,155** | |
| **Total** | **Total** | **$46,211** | **43.0%** | **69.3%** | **$38,191** | **32.5%** | **$6,391** | **396.6%** | **40** | **14.3%** | **83.3%** | **$1,155** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 12 | 7 | $10,590 | 11 | 6 | $9,017 | 0.55 | 7 | 4 | $5,459 | 57.1% | 10/31/2025 |
| | Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 6 | 2 | $2,432 | 6 | 1 | $685 | 0.17 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 1 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 7 | 3 | $925 | 7 | 3 | $925 | 0.43 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 1 | $1,299 | 1 | 1 | $1,299 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **29** | **13** | **$15,246** | **27** | **11** | **11,926** | **0.41** | **10** | **4** | **$5,459** | **40.0%** | |
| **Grand Total** | | **29** | **13** | **$15,246** | **27** | **11** | **11,926** | **0.41** | **10** | **4** | **$5,459** | **40.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Brendan O'Connell

Role: LBE

LBE UPN:1318008

RUFF & ASSOC INC

Address: 888 N COURT ST

CIRCLEVILLE OH 43113

Phone/Email: 7404741991 TODDRUFF@RUFFINSURANCE.COM

# Agency Scorecard

**OH**

## 1324591, BRIAN W LAING INS AGCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $29,931 | 9.5% | 11.2% | $19,195 | 9.2% | $2,074 | 20.7% | 38 | 15.2% | 95.0% | $788 | 10/31/2025 |
| | Home | $2,543 | 261.7% | 11.3% | $0 | 0.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $2,543 | 10/31/2025 |
| | Mobile Home | $1,191 | 5.9% | 21.0% | $1,191 | 5.9% | $0 | 0.0% | 2 | 0.0% | 100.0% | $596 | 10/31/2025 |
| | Motorcycle | $0 | -100.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$33,665** | **16.6%** | **11.6%** | **$20,386** | **9.0%** | **$2,074** | **20.7%** | **41** | **13.9%** | **95.3%** | **$821** | |
| **Total** | **Total** | **$33,665** | **16.6%** | **11.6%** | **$20,386** | **9.0%** | **$2,074** | **20.7%** | **41** | **13.9%** | **95.3%** | **$821** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 16 | 7 | $6,393 | 16 | 7 | $6,393 | 0.44 | 1 | 1 | $948 | 100.0% | 10/31/2025 |
| | Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **18** | **7** | **$6,393** | **18** | **7** | **6,393** | **0.39** | **1** | **1** | **$948** | **100.0%** | |
| **Grand Total** | | **18** | **7** | **$6,393** | **18** | **7** | **6,393** | **0.39** | **1** | **1** | **$948** | **100.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Brendan O'Connell

Role: LBE

LBE UPN:1324591

BRIAN W LAING INS AGCY INC

Address: 10670 ROYALTON RD STE 1

NORTH ROYALTON OH 44133

Phone/Email: 4402301600 BRIAN@LG-INSURANCE.COM

**OH**

# Agency Scorecard

## 1326635, BUFFO,MICHAEL

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $52,432 | -10.9% | 8.6% | $41,224 | 11.4% | $13,891 | 52.9% | 43 | -8.5% | 75.4% | $1,219 | 10/31/2025 |
| | Home | $7,935 | -35.0% | 13.1% | $5,833 | -52.2% | $0 | -100.0% | 6 | -14.3% | 75.0% | $1,323 | 10/31/2025 |
| | Mobile Home | $9,270 | 24.8% | 18.0% | $7,004 | 12.2% | $0 | 0.0% | 9 | 12.5% | 100.0% | $1,030 | 10/31/2025 |
| | Motorcycle | $296 | 1.7% | 2.1% | $296 | 1.7% | $0 | 0.0% | 1 | 0.0% | 100.0% | $296 | 10/31/2025 |
| | Rental M.H. | $1,278 | 47.7% | 4.7% | $1,278 | 47.7% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,278 | 10/31/2025 |
| | **Total** | **$71,211** | **-10.6%** | **10.2%** | **$55,635** | **-1.7%** | **$13,891** | **28.7%** | **60** | **-6.3%** | **78.9%** | **$1,187** | |
| **Total** | **Total** | **$71,211** | **-10.6%** | **10.2%** | **$55,635** | **-1.7%** | **$13,891** | **28.7%** | **60** | **-6.3%** | **78.9%** | **$1,187** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **1** | **0** | **$0** | **1** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 38 | 10 | $12,158 | 38 | 10 | $12,158 | 0.26 | 6 | 4 | $4,530 | 66.7% | 10/31/2025 |
| | Home | 15 | 1 | $949 | 13 | 1 | $949 | 0.08 | 3 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 1 | 1 | $989 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **54** | **12** | **$14,096** | **51** | **11** | **13,107** | **0.22** | **9** | **4** | **$4,530** | **44.4%** | |
| **Grand Total** | | **55** | **12** | **$14,096** | **52** | **11** | **13,107** | **0.21** | **9** | **4** | **$4,530** | **44.4%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Brendan O'Connell

Role: LBE

LBE UPN:1326635

BUFFO,MICHAEL

Address: 2605 SUNSET BLVD UNIT B

STEUBENVILLE OH 43952

Phone/Email: 7402649800 MICHAELBUFFO@OUTLOOK.COM

**OH**

# Agency Scorecard

## 1327084, PAPAS & ASSOCIATES, LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $24,211 | 189.9% | 529.3% | $22,503 | 206.0% | $2,768 | 62.9% | 16 | 166.7% | 88.9% | $1,513 | 10/31/2025 |
| | Home | $3,767 | 299.0% | 6.1% | $3,767 | 299.0% | $0 | 0.0% | 3 | 200.0% | 100.0% | $1,256 | 10/31/2025 |
| | Mobile Home | ($39) | -102.8% | 15.7% | $546 | -60.9% | $0 | 0.0% | 1 | -50.0% | 50.0% | ($39) | 10/31/2025 |
| | **Total** | **$27,939** | **161.3%** | **447.1%** | **$26,816** | **176.6%** | **$2,768** | **62.9%** | **20** | **122.2%** | **87.0%** | **$1,397** | |
| **Total** | **Total** | **$27,939** | **161.3%** | **447.1%** | **$26,816** | **176.6%** | **$2,768** | **62.9%** | **20** | **122.2%** | **87.0%** | **$1,397** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 37 | 12 | $22,874 | 34 | 12 | $22,874 | 0.35 | 3 | 1 | $1,595 | 33.3% | 10/31/2025 |
| | Home | 9 | 2 | $2,344 | 7 | 2 | $2,344 | 0.29 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **48** | **14** | **$25,218** | **43** | **14** | **25,218** | **0.33** | **3** | **1** | **$1,595** | **33.3%** | |
| **Grand Total** | | **48** | **14** | **$25,218** | **43** | **14** | **25,218** | **0.33** | **3** | **1** | **$1,595** | **33.3%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1327084

PAPAS & ASSOCIATES, LLC

Address: 1650 W MARKET ST STE 21

AKRON OH 44313

Phone/Email: 3308361234 NICOLE@WALLHAVENGROUP.COM

# Agency Scorecard

**OH**

## 1359631, MCGLOTHIN INSURANCE AND CO

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $48,950 | -5.6% | 12.5% | $44,645 | -17.3% | ($1,058) | -142.8% | 36 | 12.5% | 80.0% | $1,360 | 10/31/2025 |
| | Home | $11,824 | 647.4% | 15.0% | $10,338 | 553.5% | $0 | -100.0% | 8 | 700.0% | 100.0% | $1,478 | 10/31/2025 |
| | Mobile Home | $4,553 | 8.3% | 21.9% | $2,952 | 8.8% | $0 | -100.0% | 5 | 0.0% | 100.0% | $911 | 10/31/2025 |
| | Motor Home | $794 | -1.9% | 7.7% | $794 | -1.9% | $0 | 0.0% | 1 | 0.0% | 100.0% | $794 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Off-Road Veh | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $791 | 2.1% | 20.9% | $791 | 2.1% | $0 | 0.0% | 1 | 0.0% | 100.0% | $791 | 10/31/2025 |
| | Travel Trailer | $238 | -7.4% | 20.8% | $238 | -7.4% | $0 | -100.0% | 1 | 0.0% | 100.0% | $238 | 10/31/2025 |
| | **Total** | **$67,150** | **12.8%** | **13.4%** | **$59,758** | **-0.6%** | **($1,058)** | **-162.6%** | **52** | **26.8%** | **85.2%** | **$1,291** | |
| **Total** | **Total** | **$67,150** | **12.8%** | **13.4%** | **$59,758** | **-0.6%** | **($1,058)** | **-162.6%** | **52** | **26.8%** | **85.2%** | **$1,291** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | 151 | 13 | $13,474 | 132 | 11 | $12,139 | 0.08 | 16 | 1 | $548 | 6.3% | 10/31/2025 |
| | Home | 190 | 7 | $10,560 | 172 | 6 | $9,112 | 0.03 | 21 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 7 | 0 | $0 | 4 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **351** | **20** | **$24,034** | **311** | **17** | **21,251** | **0.05** | **37** | **1** | **$548** | **2.7%** | |
| **Grand Total** | | **351** | **20** | **$24,034** | **311** | **17** | **21,251** | **0.05** | **37** | **1** | **$548** | **2.7%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Brendan O'Connell

Role: LBE

LBE UPN:1359631

MCGLOTHIN INSURANCE AND CO

Address: 6059 FRANTZ RD STE 106

DUBLIN OH 43017

Phone/Email: 6142740112 SERVICETEAM@IWANTPROTECTED.COM

**OH**

# Agency Scorecard

## 1359635, MCGLOTHIN INSURANCE AND CO

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $9,168 | -3.9% | 10.8% | $9,168 | 2.3% | $643 | -56.3% | 9 | -18.2% | 81.8% | $1,019 | 10/31/2025 |
| | Mobile Home | $4,648 | 6.6% | 20.3% | $4,648 | 6.6% | $971 | 129.0% | 3 | 0.0% | 100.0% | $1,549 | 10/31/2025 |
| | **Total** | **$13,816** | **-0.6%** | **13.7%** | **$13,816** | **3.7%** | **$1,614** | **-14.9%** | **12** | **-14.3%** | **85.7%** | **$1,151** | |
| **Total** | **Total** | **$13,816** | **-0.6%** | **13.7%** | **$13,816** | **3.7%** | **$1,614** | **-14.9%** | **12** | **-14.3%** | **85.7%** | **$1,151** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: SUB

LBE UPN:1359631

1359631

MCGLOTHIN INSURANCE AND CO

Address: 110 N COLUMBUS ST STE 107

LANCASTER OH 43130

Phone/Email: 7406535230 SERVICETEAM@IWANTPROTECTED.COM

**OH**

# Agency Scorecard

## 1360639, ANKROM,JAMES P

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $53,130 | 119.4% | 15.5% | $48,062 | 133.1% | $3,479 | -4.2% | 33 | 175.0% | 86.8% | $1,610 | 10/31/2025 |
| | Home | $18,451 | 123.0% | 16.7% | $16,257 | 96.5% | $0 | -100.0% | 12 | 140.0% | 100.0% | $1,538 | 10/31/2025 |
| | Mobile Home | $10,205 | 7.5% | 21.9% | $9,391 | 7.9% | ($1,491) | 0.0% | 9 | 12.5% | 90.0% | $1,134 | 10/31/2025 |
| | Rental M.H. | $210 | 4.0% | 20.7% | $0 | -100.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $210 | 10/31/2025 |
| | **Total** | **$81,996** | **94.4%** | **16.9%** | **$73,710** | **95.0%** | **$1,988** | **-79.9%** | **55** | **111.5%** | **90.2%** | **$1,491** | |
| **Total** | **Total** | **$81,996** | **94.4%** | **16.9%** | **$73,710** | **95.0%** | **$1,988** | **-79.9%** | **55** | **111.5%** | **90.2%** | **$1,491** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | 77 | 26 | $40,446 | 67 | 25 | $39,071 | 0.37 | 4 | 1 | $2,079 | 25.0% | 10/31/2025 |
| | Home | 18 | 7 | $11,796 | 14 | 6 | $9,602 | 0.43 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 4 | 2 | $1,446 | 4 | 2 | $1,446 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **100** | **35** | **$53,688** | **86** | **33** | **50,119** | **0.38** | **4** | **1** | **$2,079** | **25.0%** | |
| **Grand Total** | | **100** | **35** | **$53,688** | **86** | **33** | **50,119** | **0.38** | **4** | **1** | **$2,079** | **25.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1360639

ANKROM,JAMES P

Address: 5701 N HIGH ST STE 202

WORTHINGTON OH 43085

Phone/Email: 6148881728 PAT@ANKROMAGENCY.COM

**OH**

# Agency Scorecard

## 1360640, ANKROM,JAMES P

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $10,924 | 4.7% | 12.5% | $8,415 | 0.2% | $1,880 | 2.0% | 9 | 0.0% | 100.0% | $1,214 | 10/31/2025 |
| | Mobile Home | $9,349 | -2.0% | 39.8% | $7,843 | 9.9% | $0 | 0.0% | 12 | 0.0% | 100.0% | $779 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$20,273** | **1.5%** | **25.1%** | **$16,258** | **4.7%** | **$1,880** | **2.0%** | **21** | **0.0%** | **100.0%** | **$965** | |
| **Total** | **Total** | **$20,273** | **1.5%** | **25.1%** | **$16,258** | **4.7%** | **$1,880** | **2.0%** | **21** | **0.0%** | **100.0%** | **$965** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **1** | **0** | **$0** | **1** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **1** | **0** | **$0** | **1** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: SUB

LBE UPN:1360639

1360639

ANKROM,JAMES P

Address: 50 TROY RD

DELAWARE OH 43015

Phone/Email: 7403631141 PAT@ANKROMAGENCY.COM

# Agency Scorecard

**OH**

## 1360974, FOURMAN INSURANCE LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $13,421 | -39.7% | 11.2% | $10,987 | -44.4% | ($1,792) | 0.0% | 15 | -25.0% | 75.0% | $895 | 10/31/2025 |
| | Home | $1,170 | -16.4% | 10.8% | $1,170 | -16.4% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,170 | 10/31/2025 |
| | Mobile Home | $5,865 | -2.2% | 20.1% | $5,865 | -2.2% | $2,075 | 10.8% | 6 | 0.0% | 100.0% | $978 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Off-Road Veh | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Travel Trailer | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$20,456** | **-30.5%** | **12.7%** | **$18,022** | **-33.1%** | **$283** | **-84.9%** | **22** | **-18.5%** | **81.5%** | **$930** | |
| **Total** | **Total** | **$20,456** | **-30.5%** | **12.7%** | **$18,022** | **-33.1%** | **$283** | **-84.9%** | **22** | **-18.5%** | **81.5%** | **$930** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | 3 | 0 | $0 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 1 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 3 | 0 | $0 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 1 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **9** | **0** | **$0** | **7** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **9** | **0** | **$0** | **7** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1360974

FOURMAN INSURANCE LLC

Address: 1111 N PLUM ST STE 3

SPRINGFIELD OH 45504

Phone/Email: 9373256778 JEFF@FOURMANINSURANCE.COM

# Agency Scorecard

**OH**

**1361318, TIM HESS AGENCY, INC.**

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $35,889 | 4.6% | 13.3% | $40,023 | 23.6% | $2,703 | 15.8% | 25 | 19.0% | 73.5% | $1,436 | 10/31/2025 |
| | Home | $10,270 | 157.3% | 15.0% | $8,927 | 123.6% | $1,428 | 309.2% | 5 | 150.0% | 100.0% | $2,054 | 10/31/2025 |
| | Marine | $459 | 2.0% | 6.5% | $459 | 2.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $459 | 10/31/2025 |
| | Mobile Home | $1,117 | -51.0% | 22.5% | $1,117 | -51.0% | ($734) | -5.3% | 1 | -50.0% | 50.0% | $1,117 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Off-Road Veh | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$47,735** | **16.3%** | **13.9%** | **$50,526** | **29.2%** | **$3,397** | **77.9%** | **32** | **23.1%** | **76.2%** | **$1,492** | |
| **Total** | **Total** | **$47,735** | **16.3%** | **13.9%** | **$50,526** | **29.2%** | **$3,397** | **77.9%** | **32** | **23.1%** | **76.2%** | **$1,492** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | 51 | 13 | $19,354 | 44 | 13 | $19,354 | 0.30 | 2 | 1 | $1,641 | 50.0% | 10/31/2025 |
| | Home | 61 | 3 | $5,541 | 49 | 2 | $4,198 | 0.04 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **112** | **16** | **$24,895** | **93** | **15** | **23,552** | **0.16** | **3** | **1** | **$1,641** | **33.3%** | |
| **Grand Total** | | **112** | **16** | **$24,895** | **93** | **15** | **23,552** | **0.16** | **3** | **1** | **$1,641** | **33.3%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Brendan O'Connell

Role: LBE

LBE UPN:1361318

TIM HESS AGENCY, INC.

Address: 14605 E PARK ST

BURTON OH 44021

Phone/Email: 4408344013 TIM@HESSAGENCYINC.COM

OH

# Agency Scorecard

## 1361343, THE ARAMOUNI AGENCY, LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $34,891 | 45.9% | 10.9% | $28,805 | 46.2% | $5,860 | 672.1% | 24 | 41.2% | 85.7% | $1,454 | 10/31/2025 |
| | Home | $8,123 | 81.6% | 13.3% | $8,123 | 81.6% | $966 | 9999.9% | 7 | 75.0% | 87.5% | $1,160 | 10/31/2025 |
| | Marine | $296 | -11.6% | 6.1% | $296 | -11.6% | $72 | 9999.9% | 1 | 0.0% | 100.0% | $296 | 10/31/2025 |
| | Mobile Home | $1,515 | -24.3% | 1332.5% | $779 | -39.5% | $0 | 0.0% | 2 | 0.0% | 100.0% | $758 | 10/31/2025 |
| | Off-Road Veh | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $1,897 | 2.2% | 20.9% | $1,897 | 2.2% | $0 | 0.0% | 2 | 0.0% | 100.0% | $949 | 10/31/2025 |
| | **Total** | **$46,722** | **43.4%** | **80.1%** | **$39,900** | **44.3%** | **$6,898** | **808.8%** | **36** | **38.5%** | **87.8%** | **$1,298** | |
| **Total** | **Total** | **$46,722** | **43.4%** | **80.1%** | **$39,900** | **44.3%** | **$6,898** | **808.8%** | **36** | **38.5%** | **87.8%** | **$1,298** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | 53 | 11 | $14,215 | 50 | 10 | $13,501 | 0.20 | 9 | 3 | $4,160 | 33.3% | 10/31/2025 |
| | Home | 20 | 4 | $4,313 | 19 | 4 | $4,313 | 0.21 | 1 | 1 | $966 | 100.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **74** | **15** | **$18,528** | **70** | **14** | **17,814** | **0.20** | **10** | **4** | **$5,126** | **40.0%** | |
| **Grand Total** | | **74** | **15** | **$18,528** | **70** | **14** | **17,814** | **0.20** | **10** | **4** | **$5,126** | **40.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1361343

THE ARAMOUNI AGENCY, LLC

Address: 6363 YORK RD STE 200

PARMA HEIGHTS OH 44130

Phone/Email: 4403731777 TEAM@THEAAINSURANCE.COM

**OH**

# Agency Scorecard

## 1361776, CAMBRIDGE INSURANCE GROUP LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 999.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **999.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $13,128 | 45.0% | 12.3% | $9,973 | 44.3% | $372 | -60.6% | 10 | 11.1% | 90.9% | $1,313 | 10/31/2025 |
| | Home | $1,402 | 6.6% | 12.8% | $0 | -100.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,402 | 10/31/2025 |
| | Marine | $339 | 2.4% | 6.6% | $339 | 2.4% | $0 | 0.0% | 1 | 0.0% | 100.0% | $339 | 10/31/2025 |
| | Mobile Home | $15,701 | 3.7% | 55.0% | $14,516 | 0.2% | $1,723 | 5.8% | 13 | 0.0% | 100.0% | $1,208 | 10/31/2025 |
| | Rental M.H. | $2,152 | 125.8% | 20.4% | $1,722 | 6.8% | $0 | 0.0% | 4 | 0.0% | 100.0% | $538 | 10/31/2025 |
| | **Total** | **$32,722** | **22.1%** | **34.2%** | **$26,550** | **7.6%** | **$2,095** | **-18.6%** | **29** | **3.6%** | **96.7%** | **$1,128** | |
| **Total** | **Total** | **$32,722** | **22.1%** | **34.2%** | **$26,550** | **7.6%** | **$2,095** | **-18.6%** | **29** | **3.6%** | **96.7%** | **$1,128** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 11 | 2 | $2,648 | 4 | 1 | $1,665 | 0.25 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 3 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **14** | **2** | **$2,648** | **4** | **1** | **1,665** | **0.25** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **14** | **2** | **$2,648** | **4** | **1** | **1,665** | **0.25** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1361776

CAMBRIDGE INSURANCE GROUP LLC

Address: 853 S HIGH ST

COLUMBUS OH 43206

Phone/Email: 6145861053 DAN@GERMANVILLAGEINSURANCE.COM

**OH**

# Agency Scorecard

## 1361782, CAHILL INSURANCE & FINANCIAL SERVICES, LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $11,879 | -17.2% | 24.1% | $11,426 | 3.7% | $1,691 | -77.1% | 11 | 0.0% | 68.8% | $1,080 | 10/31/2025 |
| | Home | $3,444 | -67.0% | 12.0% | $3,444 | -51.2% | $3,968 | 7.0% | 1 | -50.0% | 50.0% | $3,444 | 10/31/2025 |
| | Mobile Home | $1,290 | 1.3% | 20.8% | $607 | -1.0% | $0 | 0.0% | 2 | 0.0% | 100.0% | $645 | 10/31/2025 |
| | Rental M.H. | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$16,613** | **-36.2%** | **21.1%** | **$15,477** | **-17.2%** | **$5,659** | **-48.9%** | **14** | **-6.7%** | **70.0%** | **$1,187** | |
| **Total** | **Total** | **$16,613** | **-36.2%** | **21.1%** | **$15,477** | **-17.2%** | **$5,659** | **-48.9%** | **14** | **-6.7%** | **70.0%** | **$1,187** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | 11 | 5 | $10,552 | 11 | 5 | $10,552 | 0.45 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **11** | **5** | **$10,552** | **11** | **5** | **10,552** | **0.45** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **11** | **5** | **$10,552** | **11** | **5** | **10,552** | **0.45** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1361782

CAHILL INSURANCE & FINANCIAL SERVICES, LLC

Address: 419 DOVER CENTER RD

BAY VILLAGE OH 44140

Phone/Email: 4408353750 LCAHILL@CAHILLAGENCY.COM

**OH**

# Agency Scorecard

## 1383869, ON THE WATER MARINE INSURANCE LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $11,576 | 3517.5% | 15.2% | $11,576 | 859.9% | $860 | 9999.9% | 10 | 900.0% | 500.0% | $1,158 | 10/31/2025 |
| | Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Marine | $1,823 | 400.8% | 11.7% | $1,272 | -1943.5% | $271 | 9999.9% | 3 | 200.0% | 75.0% | $608 | 10/31/2025 |
| | Mobile Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motor Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Off-Road Veh | $0 | 0.0% | 227.8% | $0 | 0.0% | $0 | -100.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Travel Trailer | $399 | -2.7% | 17.4% | $399 | -2.7% | $0 | 0.0% | 1 | 0.0% | 100.0% | $399 | 10/31/2025 |
| | **Total** | **$13,798** | **1161.2%** | **12.9%** | **$13,247** | **756.3%** | **$1,131** | **-308.7%** | **14** | **366.7%** | **200.0%** | **$986** | |
| **Total** | **Total** | **$13,798** | **1161.2%** | **12.9%** | **$13,247** | **756.3%** | **$1,131** | **-308.7%** | **14** | **366.7%** | **200.0%** | **$986** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 1 | 1 | $1,096 | 1 | 1 | $1,096 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 36 | 3 | $1,348 | 33 | 2 | $1,001 | 0.06 | 3 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **45** | **4** | **$2,444** | **42** | **3** | **2,097** | **0.07** | **4** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **45** | **4** | **$2,444** | **42** | **3** | **2,097** | **0.07** | **4** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Brendan O'Connell

Role: LBE

LBE UPN:1383869

ON THE WATER MARINE INSURANCE LLC

Address: 575 W MAIN ST UNIT 449

BATAVIA OH 45103

Phone/Email: 5136533800 ERIC@ONTHEWATERMARINE.COM

**OH**

# Agency Scorecard

## 1405720, BONVENUTO FINANCIAL GROUP LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $6,281 | 767.5% | 14.2% | $4,408 | 76.1% | $0 | 0.0% | 3 | 50.0% | 60.0% | $2,094 | 10/31/2025 |
| | Home | $0 | -100.0% | 14.5% | $0 | -100.0% | $0 | -100.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $6,017 | 3.6% | 20.9% | $5,246 | 3.6% | $0 | 0.0% | 7 | 0.0% | 100.0% | $860 | 10/31/2025 |
| | Rental M.H. | $1,806 | 658.8% | 22.9% | $1,806 | 185.3% | $0 | 0.0% | 3 | 200.0% | 100.0% | $602 | 10/31/2025 |
| | **Total** | **$14,104** | **104.2%** | **18.2%** | **$11,460** | **37.5%** | **$0** | **-100.0%** | **13** | **18.2%** | **81.3%** | **$1,085** | |
| **Total** | **Total** | **$14,104** | **104.2%** | **18.2%** | **$11,460** | **37.5%** | **$0** | **-100.0%** | **13** | **18.2%** | **81.3%** | **$1,085** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | 18 | 3 | $4,957 | 14 | 2 | $3,084 | 0.14 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 2 | 2 | $1,159 | 2 | 2 | $1,159 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **22** | **5** | **$6,116** | **18** | **4** | **4,243** | **0.22** | **1** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **22** | **5** | **$6,116** | **18** | **4** | **4,243** | **0.22** | **1** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Brendan O'Connell

Role: LBE

LBE UPN:1405720

BONVENUTO FINANCIAL GROUP LLC

Address: 11726 CLEVELAND AVE NW

UNIONTOWN OH 44685

Phone/Email: 3306999925 ADAM@BONVENUTOFG.COM

**OH**

# Agency Scorecard

## 1410816, J-PAL INSURANCE AGENCY LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $1,005 | -46.5% | 16.3% | $1,005 | -46.5% | $0 | 0.0% | 2 | -33.3% | 66.7% | $503 | 10/31/2025 |
| | Home | $4,889 | 20.5% | 16.3% | $4,889 | 20.5% | $0 | -100.0% | 3 | 50.0% | 100.0% | $1,630 | 10/31/2025 |
| | Mobile Home | $3,410 | -46.0% | 21.7% | $3,410 | -7.6% | ($184) | -108.6% | 3 | 0.0% | 60.0% | $1,137 | 10/31/2025 |
| | Rental M.H. | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$9,304** | **-24.0%** | **18.5%** | **$9,304** | **-3.4%** | **($184)** | **-115.1%** | **8** | **0.0%** | **72.7%** | **$1,163** | |
| **Total** | **Total** | **$9,304** | **-24.0%** | **18.5%** | **$9,304** | **-3.4%** | **($184)** | **-115.1%** | **8** | **0.0%** | **72.7%** | **$1,163** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **1** | **0** | **$0** | **1** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 9 | 0 | $0 | 5 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 8 | 1 | $1,292 | 7 | 1 | $1,292 | 0.14 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 3 | 2 | $662 | 2 | 2 | $662 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **21** | **3** | **$1,954** | **15** | **3** | **1,954** | **0.20** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **22** | **3** | **$1,954** | **16** | **3** | **1,954** | **0.19** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner
Portfolio Owner: Brendan O'Connell
Role: LBE
LBE UPN:1410816

J-PAL INSURANCE AGENCY LLC
Address: 718 LAKE AVE STE 2
ASHTABULA OH 44004
Phone/Email: 4406505700 ANTHONY@OHIOHTI.COM

**OH**

# Agency Scorecard

## 1429610, CRAIG MILLER INSURANCE INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $14,687 | -17.4% | 9.9% | $12,810 | 100.8% | $5,039 | 9999.9% | 11 | -8.3% | 73.3% | $1,335 | 10/31/2025 |
| | Home | $6,154 | 164.7% | 21.1% | $6,154 | 164.7% | $0 | 0.0% | 2 | 100.0% | 100.0% | $3,077 | 10/31/2025 |
| | Mobile Home | $3,636 | -14.4% | 32.1% | $3,636 | -14.4% | $0 | -100.0% | 2 | -33.3% | 66.7% | $1,818 | 10/31/2025 |
| | Travel Trailer | $334 | 9999.9% | 21.2% | $334 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $334 | 10/31/2025 |
| | **Total** | **$24,811** | **1.9%** | **16.0%** | **$22,934** | **77.1%** | **$5,039** | **1005.0%** | **16** | **0.0%** | **76.2%** | **$1,551** | |
| **Total** | **Total** | **$24,811** | **1.9%** | **16.0%** | **$22,934** | **77.1%** | **$5,039** | **1005.0%** | **16** | **0.0%** | **76.2%** | **$1,551** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 7 | 3 | $11,193 | 5 | 2 | $7,852 | 0.40 | 1 | 1 | $5,039 | 100.0% | 10/31/2025 |
| | Home | 3 | 1 | $3,587 | 1 | 1 | $3,587 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 1 | 1 | $334 | 1 | 1 | $334 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **11** | **5** | **$15,114** | **7** | **4** | **11,773** | **0.57** | **1** | **1** | **$5,039** | **100.0%** | |
| **Grand Total** | | **11** | **5** | **$15,114** | **7** | **4** | **11,773** | **0.57** | **1** | **1** | **$5,039** | **100.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1429610

CRAIG MILLER INSURANCE INC

Address: 1296 DELAWARE AVE

MARION OH 43302

Phone/Email: 7403756800 ANGIE@CRAIGMILLERINSURANCE.COM

**OK**

# Agency Scorecard

## 1275077, JOHN SHAWAREB AGENCY LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $5,404 | 11.0% | 24.7% | $5,404 | 11.0% | $0 | 0.0% | 3 | 0.0% | 100.0% | $1,801 | 10/31/2025 |
| | **Total** | **$5,404** | **11.0%** | **24.7%** | **$5,404** | **11.0%** | **$0** | **0.0%** | **3** | **0.0%** | **100.0%** | **$1,801** | |
| **Total** | **Total** | **$5,404** | **11.0%** | **24.7%** | **$5,404** | **11.0%** | **$0** | **0.0%** | **3** | **0.0%** | **100.0%** | **$1,801** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 16 | 0 | $0 | 16 | 0 | $0 | 0.00 | 3 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **16** | **0** | **$0** | **16** | **0** | **0** | **0.00** | **3** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **16** | **0** | **$0** | **16** | **0** | **0** | **0.00** | **3** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1275077

JOHN SHAWAREB AGENCY LLC

Address: 11901 N MACARTHUR BLVD STE D9

OKLAHOMA CITY OK 73162

Phone/Email: 4055099433 JOHN@OKCINSURANCEBROKER.COM

**OK**

# Agency Scorecard

## 1426506, JBRAINE AGENCY LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | -100.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **-100.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $36,300 | 64.1% | 29.0% | $26,881 | 39.1% | $6,801 | -600.1% | 9 | 28.6% | 100.0% | $4,033 | 10/31/2025 |
| | Mobile Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Off-Road Veh | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Travel Trailer | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$36,300** | **64.1%** | **29.0%** | **$26,881** | **39.1%** | **$6,801** | **-600.1%** | **9** | **28.6%** | **100.0%** | **$4,033** | |
| **Total** | **Total** | **$36,300** | **68.8%** | **29.0%** | **$26,881** | **39.1%** | **$6,801** | **-600.1%** | **9** | **28.6%** | **100.0%** | **$4,033** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 727 | 0 | $0 | 600 | 0 | $0 | 0.00 | 24 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **727** | **0** | **$0** | **600** | **0** | **0** | **0.00** | **24** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 23 | 2 | $9,779 | 13 | 1 | $3,194 | 0.08 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 5 | 0 | $0 | 5 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **30** | **2** | **$9,779** | **20** | **1** | **3,194** | **0.05** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **757** | **2** | **$9,779** | **620** | **1** | **3,194** | **0.00** | **24** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1426506

JBRAINE AGENCY LLC

Address: 111 HARRISON AVE

OKLAHOMA CITY OK 73104

Phone/Email: 4057749121 MIKABRAINE@LEAP-INSURANCE.COM

# Agency Scorecard

**OK**

## 1447609, MINER FAMILY INSURANCE, LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $10,511 | 37.0% | 28.6% | $10,511 | 37.0% | $0 | 0.0% | 4 | 100.0% | 100.0% | $2,628 | 10/31/2025 |
| | Mobile Home | ($2,065) | -166.3% | -13.0% | $0 | -100.0% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Motor Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Travel Trailer | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$8,446** | **-21.7%** | **26.5%** | **$10,511** | **-2.6%** | **$0** | **0.0%** | **4** | **33.3%** | **80.0%** | **$2,112** | |
| **Total** | **Total** | **$8,446** | **-21.7%** | **26.5%** | **$10,511** | **-2.6%** | **$0** | **0.0%** | **4** | **33.3%** | **80.0%** | **$2,112** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 11 | 2 | $4,245 | 11 | 2 | $4,245 | 0.18 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 3 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **16** | **2** | **$4,245** | **15** | **2** | **4,245** | **0.13** | **1** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **16** | **2** | **$4,245** | **15** | **2** | **4,245** | **0.13** | **1** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1447609

MINER FAMILY INSURANCE, LLC

Address: 3209 S BROADWAY STE 229

EDMOND OK 73013

Phone/Email: 4057242389 JOSH@MINERFAMILYINSURANCE.COM

**OR**

# Agency Scorecard

## 1286034, OREGON INSURANCE LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $6,367 | -14.6% | 1.1% | $6,646 | 14.2% | $3,326 | 224.2% | 4 | 33.3% | 80.0% | $1,592 | 10/31/2025 |
| | **Total** | **$6,367** | **-14.6%** | **1.1%** | **$6,646** | **14.2%** | **$3,326** | **224.2%** | **4** | **33.3%** | **80.0%** | **$1,592** | |
| Foremost Choice | Dwelling Fire | $32,122 | 16.2% | 55.4% | $27,018 | 19.5% | $2,309 | 74.7% | 18 | 20.0% | 90.0% | $1,785 | 10/31/2025 |
| | Home | $15,235 | 31.2% | 11.8% | $13,517 | 16.4% | $1,296 | -34.1% | 11 | 57.1% | 84.6% | $1,385 | 10/31/2025 |
| | Marine | $787 | 0.4% | 9.5% | $787 | 0.4% | $0 | 0.0% | 2 | 0.0% | 100.0% | $394 | 10/31/2025 |
| | Mobile Home | $22,982 | -12.5% | 10.1% | $17,053 | -22.8% | $3,950 | -18.1% | 24 | -7.7% | 85.7% | $958 | 10/31/2025 |
| | Motor Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Off-Road Veh | $428 | -1.2% | 1.9% | $428 | -1.2% | $0 | 0.0% | 1 | 0.0% | 100.0% | $428 | 10/31/2025 |
| | Rental M.H. | $2,112 | 4.3% | 9.3% | $2,112 | 4.3% | $0 | 0.0% | 2 | 0.0% | 100.0% | $1,056 | 10/31/2025 |
| | Travel Trailer | $379 | 1.1% | 11.2% | $379 | 1.1% | $0 | 0.0% | 1 | 0.0% | 100.0% | $379 | 10/31/2025 |
| | **Total** | **$74,045** | **7.1%** | **30.4%** | **$61,294** | **2.3%** | **$7,555** | **-6.8%** | **59** | **9.3%** | **88.1%** | **$1,255** | |
| **Total** | **Total** | **$80,412** | **5.0%** | **28.8%** | **$67,940** | **3.3%** | **$10,881** | **19.1%** | **63** | **10.5%** | **87.5%** | **$1,276** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 35 | 2 | $2,893 | 31 | 2 | $2,893 | 0.06 | 5 | 1 | $2,310 | 20.0% | 10/31/2025 |
| | **Total** | **35** | **2** | **$2,893** | **31** | **2** | **2,893** | **0.06** | **5** | **1** | **$2,310** | **20.0%** | |
| Foremost Choice | Dwelling Fire | 12 | 5 | $7,227 | 7 | 4 | $6,299 | 0.57 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 11 | 6 | $7,185 | 10 | 6 | $7,185 | 0.60 | 1 | 1 | $1,296 | 100.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 6 | 2 | $2,174 | 6 | 2 | $2,174 | 0.33 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 1 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **31** | **13** | **$16,586** | **24** | **12** | **15,658** | **0.50** | **1** | **1** | **$1,296** | **100.0%** | |
| **Grand Total** | | **66** | **15** | **$19,479** | **55** | **14** | **18,551** | **0.25** | **6** | **2** | **$3,606** | **33.3%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Holley Wurst

Role: LBE

LBE UPN:1286034

OREGON INSURANCE LLC

Address: 815 LANCASTER DR SE

SALEM OR 97317

Phone/Email: 5033718888 ORINSURELLC@HOTMAIL.COM

**OR**

# Agency Scorecard

## 1286038, WONG,JOHN

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $1,009 | 34.2% | 7.3% | $1,009 | 34.2% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,009 | 10/31/2025 |
| | Home | $727 | 23.0% | 7.1% | $727 | 23.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $727 | 10/31/2025 |
| | **Total** | **$1,736** | **29.3%** | **7.2%** | **$1,736** | **29.3%** | **$0** | **0.0%** | **2** | **0.0%** | **100.0%** | **$868** | |
| **Total** | **Total** | **$1,736** | **29.3%** | **7.2%** | **$1,736** | **29.3%** | **$0** | **0.0%** | **2** | **0.0%** | **100.0%** | **$868** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Holley Wurst

Role: SUB

LBE UPN:1286034

1286034

WONG,JOHN

Address: 815 LANCASTER DR SE

SALEM OR 97317

Phone/Email: 5033718888 ORINSURELLC@HOTMAIL.COM

PA

# Agency Scorecard

## 171849, VICTOR J B FINANCIAL CORPORATION

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $13,750 | -18.0% | 2.2% | $12,017 | -26.3% | $614 | 9999.9% | 3 | 0.0% | 42.9% | $4,583 | 10/31/2025 |
| | **Total** | **$13,750** | **-18.0%** | **2.2%** | **$12,017** | **-26.3%** | **$614** | **9999.9%** | **3** | **0.0%** | **42.9%** | **$4,583** | |
| Foremost Choice | Dwelling Fire | $127,927 | 1.4% | 8.8% | $105,718 | 1.5% | $6,579 | -10.1% | 105 | -4.5% | 87.5% | $1,218 | 10/31/2025 |
| | Home | $2,368 | 9999.9% | 12.7% | $2,368 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 50.0% | $2,368 | 10/31/2025 |
| | **Total** | **$130,295** | **3.3%** | **8.8%** | **$108,086** | **3.7%** | **$6,579** | **-10.1%** | **106** | **-3.6%** | **86.9%** | **$1,229** | |
| **Total** | **Total** | **$144,045** | **0.8%** | **8.2%** | **$120,103** | **-0.3%** | **$7,193** | **-1.7%** | **109** | **-3.5%** | **84.5%** | **$1,322** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 34 | 4 | $5,334 | 30 | 3 | $3,601 | 0.10 | 5 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **35** | **4** | **$5,334** | **31** | **3** | **3,601** | **0.10** | **5** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 65 | 10 | $9,433 | 52 | 7 | $7,035 | 0.13 | 6 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 5 | 2 | $3,457 | 4 | 2 | $3,457 | 0.50 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **70** | **12** | **$12,890** | **56** | **9** | **10,492** | **0.16** | **8** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **105** | **16** | **$18,224** | **87** | **12** | **14,093** | **0.14** | **13** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Keith Long

Role: LBE

LBE UPN:171849

VICTOR J B FINANCIAL CORPORATION

Address: 1110 COTTMAN AVE

PHILADELPHIA PA 19111

Phone/Email: 2157426408 JAMES@JBVICTOR.NET

# Agency Scorecard

**PA**

## 1201586, NICHOLAS INSURANCE SOLUTIONS LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $1,027 | 6.2% | 1.8% | $519 | 4.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,027 | 10/31/2025 |
| | **Total** | **$1,027** | **6.2%** | **1.8%** | **$519** | **4.0%** | **$0** | **0.0%** | **1** | **0.0%** | **100.0%** | **$1,027** | |
| Foremost Choice | Dwelling Fire | $36,644 | 89.2% | 9.1% | $25,254 | 105.3% | $6,172 | -3400.5% | 21 | 16.7% | 77.8% | $1,745 | 10/31/2025 |
| | Home | $6,581 | 51.1% | 9.3% | $5,603 | 28.7% | $0 | -100.0% | 5 | 66.7% | 100.0% | $1,316 | 10/31/2025 |
| | Mobile Home | $28,629 | 14.5% | 18.0% | $24,024 | 19.0% | $4,133 | 28.7% | 31 | 19.2% | 88.6% | $924 | 10/31/2025 |
| | Rental M.H. | $2,510 | -26.5% | 17.2% | $313 | -86.5% | $0 | 0.0% | 2 | -33.3% | 66.7% | $1,255 | 10/31/2025 |
| | Travel Trailer | $1,772 | 128.9% | 12.6% | $1,772 | 215.3% | $0 | 0.0% | 3 | 50.0% | 100.0% | $591 | 10/31/2025 |
| | **Total** | **$76,136** | **43.9%** | **13.2%** | **$56,966** | **43.4%** | **$10,305** | **133.7%** | **62** | **19.2%** | **84.9%** | **$1,228** | |
| **Total** | **Total** | **$77,163** | **43.2%** | **13.0%** | **$57,485** | **42.9%** | **$10,305** | **133.7%** | **63** | **18.9%** | **85.1%** | **$1,225** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 54 | 0 | $0 | 42 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **54** | **0** | **$0** | **42** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 36 | 9 | $13,610 | 28 | 7 | $10,655 | 0.25 | 6 | 2 | $3,012 | 33.3% | 10/31/2025 |
| | Home | 7 | 2 | $1,665 | 6 | 1 | $687 | 0.17 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 21 | 9 | $8,887 | 18 | 7 | $6,414 | 0.39 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 3 | 0 | $0 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 5 | 1 | $882 | 4 | 1 | $882 | 0.25 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **72** | **21** | **$25,044** | **59** | **16** | **18,638** | **0.27** | **7** | **2** | **$3,012** | **28.6%** | |
| **Grand Total** | | **126** | **21** | **$25,044** | **101** | **16** | **18,638** | **0.16** | **7** | **2** | **$3,012** | **28.6%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Abby Haas

Role: LBE

LBE UPN:1201586

NICHOLAS INSURANCE SOLUTIONS LLC

Address: 1550 KENNETH RD STE 5

YORK PA 17408

Phone/Email: 7177642477 NIS.JODY@COMCAST.NET

# Agency Scorecard

**PA**

## 1277375, ED TROY INSURANCE AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $4,604 | 25.2% | 3.8% | $4,526 | 23.1% | $0 | -100.0% | 1 | -50.0% | 50.0% | $4,604 | 10/31/2025 |
| | **Total** | **$4,604** | **25.2%** | **3.8%** | **$4,526** | **23.1%** | **$0** | **-100.0%** | **1** | **-50.0%** | **50.0%** | **$4,604** | |
| Foremost Choice | Dwelling Fire | $4,890 | -29.2% | 4.5% | ($189) | -109.6% | $0 | 0.0% | 3 | -25.0% | 75.0% | $1,630 | 10/31/2025 |
| | Home | $3,695 | 2.8% | 5.7% | $3,695 | 2.8% | $0 | 0.0% | 2 | 0.0% | 100.0% | $1,848 | 10/31/2025 |
| | Mobile Home | $6,038 | 17.0% | 43.0% | $5,614 | 11.7% | $403 | 9999.9% | 10 | 0.0% | 100.0% | $604 | 10/31/2025 |
| | Rental M.H. | $821 | 6.1% | 12.9% | $821 | 6.1% | $0 | 0.0% | 2 | 0.0% | 100.0% | $411 | 10/31/2025 |
| | **Total** | **$15,444** | **-6.0%** | **17.8%** | **$9,941** | **-12.5%** | **$403** | **9999.9%** | **17** | **-5.6%** | **94.4%** | **$908** | |
| **Total** | **Total** | **$20,048** | **-0.3%** | **13.9%** | **$14,467** | **-3.8%** | **$403** | **-79.7%** | **18** | **-10.0%** | **90.0%** | **$1,114** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 4 | 0 | $0 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 152 | 0 | $0 | 148 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **156** | **0** | **$0** | **151** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 8 | 0 | $0 | 8 | 0 | $0 | 0.00 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 3 | 0 | $0 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **11** | **0** | **$0** | **11** | **0** | **0** | **0.00** | **2** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **167** | **0** | **$0** | **162** | **0** | **0** | **0.00** | **2** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Abby Haas

Role: LBE

LBE UPN:1277375

ED TROY INSURANCE AGENCY INC

Address: 1325 N RIVER ST STE 112

PLAINS TOWNSHIP PA 18702

Phone/Email: 5708237626 INFO@ETROYINSURANCE.COM

PA

# Agency Scorecard

## 1277405, D ARCY D SAMPSELL LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $12,746 | 39.2% | 406.6% | $10,250 | 10.6% | $0 | 0.0% | 5 | 25.0% | 100.0% | $2,549 | 10/31/2025 |
| | **Total** | **$12,746** | **39.2%** | **406.6%** | **$10,250** | **10.6%** | **$0** | **0.0%** | **5** | **25.0%** | **100.0%** | **$2,549** | |
| Foremost Choice | Dwelling Fire | $1,466 | 1.5% | 6.1% | $1,466 | 1.5% | $715 | 1.7% | 2 | 0.0% | 100.0% | $733 | 10/31/2025 |
| | Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $2,026 | 4.4% | 13.3% | $1,712 | -11.8% | $0 | 0.0% | 2 | 0.0% | 66.7% | $1,013 | 10/31/2025 |
| | Motor Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$3,492** | **3.1%** | **10.3%** | **$3,178** | **-6.1%** | **$715** | **1.7%** | **4** | **0.0%** | **80.0%** | **$873** | |
| **Total** | **Total** | **$16,238** | **29.5%** | **323.9%** | **$13,428** | **6.1%** | **$715** | **1.7%** | **9** | **12.5%** | **90.0%** | **$1,804** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 111 | 1 | $1,523 | 88 | 0 | $0 | 0.00 | 9 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **113** | **1** | **$1,523** | **90** | **0** | **0** | **0.00** | **9** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 3 | 0 | $0 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 2 | 1 | $314 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **5** | **1** | **$314** | **4** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **118** | **2** | **$1,837** | **94** | **0** | **0** | **0.00** | **9** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Abby Haas

Role: LBE

LBE UPN:1277405

D ARCY D SAMPSELL LLC

Address: 28 BOUND AVE

MILTON PA 17847

Phone/Email: 5707422070 SAMPSELLAGENCY@GMAIL.COM

# Agency Scorecard

**PA**

## 1277959, STOUFFER,LEROY P

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $30,810 | -3.3% | -11.7% | $23,768 | -3.1% | $2,329 | -513.7% | 34 | -8.1% | 79.1% | $906 | 10/31/2025 |
| | Home | $2,211 | 62.2% | 6.8% | $799 | 9999.9% | $0 | 0.0% | 2 | 100.0% | 100.0% | $1,106 | 10/31/2025 |
| | Mobile Home | $39,453 | 2.3% | 21.4% | $34,676 | 0.3% | $2,761 | 17.4% | 48 | -2.0% | 92.3% | $822 | 10/31/2025 |
| | Motor Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $1,383 | -39.0% | 2.6% | $1,655 | -27.1% | $0 | 0.0% | 3 | -25.0% | 75.0% | $461 | 10/31/2025 |
| | Off-Road Veh | $1,844 | 55.7% | 4.5% | $1,844 | 55.7% | ($17) | -142.5% | 14 | 27.3% | 93.3% | $132 | 10/31/2025 |
| | Rental M.H. | $4,375 | 80.3% | 11.8% | $4,159 | 53.2% | $1,012 | 2.3% | 7 | -12.5% | 87.5% | $625 | 10/31/2025 |
| | Travel Trailer | $4,347 | 14.7% | 7.7% | $4,112 | 15.8% | $0 | 0.0% | 9 | 28.6% | 100.0% | $483 | 10/31/2025 |
| | **Total** | **$84,423** | **3.7%** | **6.9%** | **$71,013** | **3.2%** | **$6,085** | **115.9%** | **117** | **0.0%** | **88.0%** | **$722** | |
| **Total** | **Total** | **$84,423** | **3.7%** | **6.9%** | **$71,013** | **3.2%** | **$6,085** | **115.9%** | **117** | **0.0%** | **88.0%** | **$722** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 17 | 6 | $8,152 | 14 | 4 | $6,399 | 0.29 | 5 | 1 | $1,499 | 20.0% | 10/31/2025 |
| | Home | 2 | 1 | $799 | 2 | 1 | $799 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 10 | 3 | $3,466 | 9 | 3 | $3,466 | 0.33 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 6 | 4 | $370 | 6 | 4 | $370 | 0.67 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 3 | 0 | $0 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 4 | 2 | $769 | 4 | 2 | $769 | 0.50 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **44** | **16** | **$13,556** | **40** | **14** | **11,803** | **0.35** | **8** | **1** | **$1,499** | **12.5%** | |
| **Grand Total** | | **44** | **16** | **$13,556** | **40** | **14** | **11,803** | **0.35** | **8** | **1** | **$1,499** | **12.5%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Elizabeth Wilkinson

Role: LBE

LBE UPN:1277959

STOUFFER,LEROY P

Address: 107 W GEORGE ST

CARMICHAELS PA 15320

Phone/Email: 7249667156 STOUFFERAGENCY@OUTLOOK.COM

# Agency Scorecard

**PA**

## 1278022, THE REFICE AGENCY

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $20,373 | 296.9% | 2.2% | $20,373 | 296.9% | $0 | 0.0% | 3 | 200.0% | 150.0% | $6,791 | 10/31/2025 |
| | **Total** | **$20,373** | **296.9%** | **2.2%** | **$20,373** | **296.9%** | **$0** | **0.0%** | **3** | **200.0%** | **150.0%** | **$6,791** | |
| Foremost Choice | Dwelling Fire | $19,603 | 30.7% | 10.6% | $17,145 | 36.4% | $0 | 0.0% | 6 | -14.3% | 60.0% | $3,267 | 10/31/2025 |
| | Home | $4,721 | 225.6% | 11.5% | $3,194 | 120.3% | $1,642 | 9999.9% | 2 | 100.0% | 100.0% | $2,361 | 10/31/2025 |
| | Mobile Home | $1,331 | 5.6% | 19.1% | $1,331 | 5.6% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,331 | 10/31/2025 |
| | Motorcycle | $668 | 7.1% | 3.7% | $668 | 7.1% | $0 | 0.0% | 1 | 0.0% | 100.0% | $668 | 10/31/2025 |
| | Rental M.H. | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$26,323** | **43.6%** | **11.1%** | **$22,338** | **40.5%** | **$1,642** | **9999.9%** | **10** | **0.0%** | **71.4%** | **$2,632** | |
| **Total** | **Total** | **$46,696** | **99.0%** | **6.8%** | **$42,711** | **103.0%** | **$1,642** | **9999.9%** | **13** | **18.2%** | **81.3%** | **$3,592** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 41 | 1 | $2,131 | 36 | 1 | $2,131 | 0.03 | 4 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **41** | **1** | **$2,131** | **36** | **1** | **2,131** | **0.03** | **4** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 10 | 3 | $12,680 | 8 | 3 | $12,680 | 0.38 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 1 | 1 | $1,527 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **12** | **4** | **$14,207** | **9** | **3** | **12,680** | **0.33** | **2** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **53** | **5** | **$16,338** | **45** | **4** | **14,811** | **0.09** | **6** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Keith Long

Role: LBE

LBE UPN:1278022

THE REFICE AGENCY

Address: 1601 N BROAD ST STE 104B

LANSDALE PA 19446

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PA

# Agency Scorecard

## 1278112, GENESIS 50:20 LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $6,734 | 73.2% | 2.2% | $6,734 | 73.2% | $0 | 0.0% | 1 | 0.0% | 100.0% | $6,734 | 10/31/2025 |
| | **Total** | **$6,734** | **73.2%** | **2.2%** | **$6,734** | **73.2%** | **$0** | **0.0%** | **1** | **0.0%** | **100.0%** | **$6,734** | |
| Foremost Choice | Dwelling Fire | $90,490 | 27.6% | 8.6% | $87,311 | 34.1% | $4,037 | -58.6% | 19 | 11.8% | 70.4% | $4,763 | 10/31/2025 |
| | Home | $2,952 | 15.3% | 6.4% | $2,952 | 15.3% | $0 | 0.0% | 1 | 0.0% | 50.0% | $2,952 | 10/31/2025 |
| | Mobile Home | $9,940 | 13.2% | 13.6% | $8,475 | 15.0% | $0 | 0.0% | 10 | 0.0% | 90.9% | $994 | 10/31/2025 |
| | Rental M.H. | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$103,382** | **25.7%** | **9.0%** | **$98,738** | **31.6%** | **$4,037** | **-58.6%** | **30** | **7.1%** | **75.0%** | **$3,446** | |
| **Total** | **Total** | **$110,116** | **27.8%** | **8.6%** | **$105,472** | **33.7%** | **$4,037** | **-58.6%** | **31** | **6.9%** | **75.6%** | **$3,552** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 8 | 0 | $0 | 6 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **8** | **0** | **$0** | **6** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 34 | 10 | $22,351 | 29 | 10 | $22,351 | 0.34 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 3 | 1 | $1,772 | 1 | 1 | $1,772 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 3 | 1 | $773 | 3 | 1 | $773 | 0.33 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **40** | **12** | **$24,896** | **33** | **12** | **24,896** | **0.36** | **1** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **48** | **12** | **$24,896** | **39** | **12** | **24,896** | **0.31** | **1** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Matthew Dudash

Role: LBE

LBE UPN:1278112

GENESIS 50:20 LLC

Address: 1422 HAMILTON ST

ALLENTOWN PA 18102

Phone/Email: 6104335000 INFO@KRISKOINSURANCE.COM

PA

# Agency Scorecard

## 1278132, MIRENZI,JOSEPH J

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **-100.0%** | **0.0%** | **$0** | **-100.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $8,072 | -33.3% | 9.2% | $4,985 | -45.8% | $1,023 | 254.0% | 7 | -22.2% | 77.8% | $1,153 | 10/31/2025 |
| | Home | $1,336 | 2.4% | 11.1% | $1,336 | 2.4% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,336 | 10/31/2025 |
| | Mobile Home | $2,188 | 4.7% | 11.8% | $1,470 | 1.4% | $0 | 0.0% | 3 | 0.0% | 100.0% | $729 | 10/31/2025 |
| | Motorcycle | $118 | 9.3% | 3.8% | $118 | 9.3% | $0 | 0.0% | 1 | 0.0% | 100.0% | $118 | 10/31/2025 |
| | Rental M.H. | $288 | 1.8% | 13.0% | $288 | 1.8% | $0 | 0.0% | 1 | 0.0% | 100.0% | $288 | 10/31/2025 |
| | **Total** | **$12,002** | **-24.4%** | **9.8%** | **$8,197** | **-33.6%** | **$1,023** | **254.0%** | **13** | **-13.3%** | **86.7%** | **$923** | |
| **Total** | **Total** | **$12,002** | **-24.3%** | **9.8%** | **$8,197** | **-33.4%** | **$1,023** | **254.0%** | **13** | **-13.3%** | **86.7%** | **$923** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 7 | 0 | $0 | 4 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **9** | **0** | **$0** | **6** | **0** | **0** | **0.00** | **1** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **9** | **0** | **$0** | **6** | **0** | **0** | **0.00** | **1** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Abby Haas

Role: LBE

LBE UPN:1278132

MIRENZI,JOSEPH J

Address: 203 ZIEGLER ST

DUPONT PA 18641

Phone/Email: 5706556487 JJMIRENZI@GMAIL.COM

PA

# Agency Scorecard

## 1278325, RCK FAMILY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $3,335 | 2.1% | 3.1% | $3,335 | 2.1% | $1,265 | 3.7% | 2 | 0.0% | 100.0% | $1,668 | 10/31/2025 |
| | **Total** | **$3,335** | **2.1%** | **3.1%** | **$3,335** | **2.1%** | **$1,265** | **3.7%** | **2** | **0.0%** | **100.0%** | **$1,668** | |
| Foremost Choice | Dwelling Fire | $51,794 | 9.1% | 14.5% | $36,169 | 9.3% | $3,324 | 296.2% | 43 | -14.0% | 84.3% | $1,205 | 10/31/2025 |
| | Home | $680 | -76.0% | 3.3% | $680 | -76.0% | $0 | 0.0% | 1 | -50.0% | 50.0% | $680 | 10/31/2025 |
| | Marine | $1,049 | -7.3% | 16.7% | $1,049 | -7.3% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,049 | 10/31/2025 |
| | Mobile Home | $36,344 | 4.4% | 32.1% | $27,249 | 3.0% | $520 | -78.0% | 38 | -13.6% | 86.4% | $956 | 10/31/2025 |
| | Motor Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Off-Road Veh | $75 | -56.1% | -0.4% | $75 | -56.1% | $0 | 0.0% | 1 | -50.0% | 50.0% | $75 | 10/31/2025 |
| | Rental M.H. | $4,519 | -27.6% | 10.7% | $4,979 | -14.2% | $0 | -100.0% | 7 | -30.0% | 58.3% | $646 | 10/31/2025 |
| | Travel Trailer | $4,464 | 14.8% | 8.5% | $3,164 | -4.9% | ($594) | 0.0% | 6 | -25.0% | 75.0% | $744 | 10/31/2025 |
| | **Total** | **$98,925** | **2.4%** | **20.5%** | **$73,365** | **0.8%** | **$3,250** | **-10.7%** | **97** | **-17.1%** | **80.8%** | **$1,020** | |
| **Total** | **Total** | **$102,260** | **2.4%** | **19.9%** | **$76,700** | **0.8%** | **$4,515** | **-7.1%** | **99** | **-16.8%** | **81.1%** | **$1,033** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 9 | 1 | $2,012 | 6 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 2 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 2 | 2 | $1,715 | 2 | 2 | $1,715 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **16** | **3** | **$3,727** | **12** | **2** | **1,715** | **0.17** | **1** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **16** | **3** | **$3,727** | **12** | **2** | **1,715** | **0.17** | **1** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Elizabeth Wilkinson

Role: LBE

LBE UPN:1278325

RCK FAMILY INC

Address: 870 MCCLELLANDTOWN RD

MC CLELLANDTOWN PA 15458

Phone/Email: 7244373377 CASSANDRA@SAVEBIGWITHUS.COM

# Agency Scorecard

**PA**

## 1278563, MCMILLAN INSURANCE AGENCY LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $604 | 37.6% | 5.1% | $256 | 9999.9% | $0 | 0.0% | 1 | 0.0% | 50.0% | $604 | 10/31/2025 |
| | Personal Auto | $35,415 | -34.7% | 62.6% | $30,818 | -31.1% | ($1,918) | -127.4% | 12 | -33.3% | 57.1% | $2,951 | 10/31/2025 |
| | **Total** | **$36,019** | **-34.1%** | **62.1%** | **$31,074** | **-30.6%** | **($1,918)** | **-127.4%** | **13** | **-31.6%** | **56.5%** | **$2,771** | |
| Foremost Choice | Dwelling Fire | $17,155 | 64.2% | 121.5% | $15,293 | 173.6% | $3,376 | 9999.9% | 9 | 28.6% | 64.3% | $1,906 | 10/31/2025 |
| | Home | $6,470 | 13.9% | 7.2% | $6,470 | 20.4% | $3,852 | 58.9% | 3 | 50.0% | 75.0% | $2,157 | 10/31/2025 |
| | Mobile Home | $7,598 | 81.9% | 16.2% | $6,483 | 66.6% | $0 | -100.0% | 7 | 40.0% | 100.0% | $1,085 | 10/31/2025 |
| | Motorcycle | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Off-Road Veh | $0 | 0.0% | 999.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Travel Trailer | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$31,223** | **56.2%** | **65.7%** | **$28,246** | **94.2%** | **$7,228** | **466.5%** | **19** | **35.7%** | **76.0%** | **$1,643** | |
| **Total** | **Total** | **$67,242** | **-10.0%** | **63.2%** | **$59,320** | **0.1%** | **$5,310** | **-35.8%** | **32** | **-3.0%** | **66.7%** | **$2,101** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 1 | 1 | $526 | 1 | 1 | $526 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 189 | 3 | $8,904 | 149 | 3 | $8,904 | 0.02 | 14 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **190** | **4** | **$9,430** | **150** | **4** | **9,430** | **0.03** | **14** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 49 | 7 | $11,261 | 40 | 7 | $11,261 | 0.18 | 7 | 2 | $3,376 | 28.6% | 10/31/2025 |
| | Home | 8 | 2 | $2,776 | 7 | 2 | $2,776 | 0.29 | 1 | 1 | $1,325 | 100.0% | 10/31/2025 |
| | Mobile Home | 3 | 2 | $2,080 | 3 | 2 | $2,080 | 0.67 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **61** | **11** | **$16,117** | **51** | **11** | **16,117** | **0.22** | **8** | **3** | **$4,701** | **37.5%** | |
| **Grand Total** | | **251** | **15** | **$25,547** | **201** | **15** | **25,547** | **0.07** | **22** | **3** | **$4,701** | **13.6%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Jen Rongione

Role: LBE

LBE UPN:1278563

MCMILLAN INSURANCE AGENCY LLC

Address: 2343 S QUEEN ST

YORK PA 17402

Phone/Email: 7178500503 MELISSA@MCMILLIANINSURANCE.NET

# Agency Scorecard

**PA**

## 1278634, DRAZICK INS & FINANCIAL SVS INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $3,013 | -10.7% | -16.5% | $3,013 | -10.7% | $0 | 0.0% | 1 | 0.0% | 100.0% | $3,013 | 10/31/2025 |
| | Personal Auto | $15,771 | -29.6% | 26.1% | $12,323 | -18.4% | $901 | -65.9% | 4 | -42.9% | 28.6% | $3,943 | 10/31/2025 |
| | **Total** | **$18,784** | **-27.2%** | **18.6%** | **$15,336** | **-17.0%** | **$901** | **-65.9%** | **5** | **-37.5%** | **33.3%** | **$3,757** | |
| Foremost Choice | Dwelling Fire | $7,085 | -10.8% | 6.1% | $1,230 | -76.2% | $0 | 0.0% | 5 | -16.7% | 83.3% | $1,417 | 10/31/2025 |
| | Home | $1,054 | -64.9% | 10.2% | $1,054 | -64.9% | $0 | -100.0% | 1 | 0.0% | 100.0% | $1,054 | 10/31/2025 |
| | Mobile Home | $6,165 | -9.8% | 12.5% | $6,165 | -9.8% | $1,604 | -20.4% | 7 | -12.5% | 87.5% | $881 | 10/31/2025 |
| | Motorcycle | $2,311 | -30.3% | 9.2% | $2,343 | -29.4% | $0 | -100.0% | 2 | 0.0% | 100.0% | $1,156 | 10/31/2025 |
| | Rental M.H. | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Travel Trailer | $75 | -76.7% | 4.1% | $75 | -76.7% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$16,690** | **-16.9%** | **9.0%** | **$10,867** | **-41.2%** | **$1,604** | **-61.8%** | **15** | **-16.7%** | **83.3%** | **$1,113** | |
| **Total** | **Total** | **$35,474** | **-22.7%** | **14.2%** | **$26,203** | **-29.1%** | **$2,505** | **-63.4%** | **20** | **-23.1%** | **60.6%** | **$1,774** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 248 | 7 | $8,437 | 209 | 4 | $4,795 | 0.02 | 15 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **248** | **7** | **$8,437** | **209** | **4** | **4,795** | **0.02** | **15** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 24 | 0 | $0 | 18 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 9 | 0 | $0 | 8 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 8 | 0 | $0 | 4 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 2 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **45** | **0** | **$0** | **33** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **293** | **7** | **$8,437** | **242** | **4** | **4,795** | **0.02** | **15** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Donald Krafjack

Role: LBE

LBE UPN:1278634

DRAZICK INS & FINANCIAL SVS INC

Address: 6 N CENTRAL AVE 2ND FL

CANONSBURG PA 15317

Phone/Email: 7247456603 AGENCY@INSUREWITHDIFS.COM

PA

# Agency Scorecard

## 1278782, MATT GIELLO AGENCY

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $11,711 | -22.1% | 2.3% | $11,711 | -22.1% | $0 | -100.0% | 1 | 0.0% | 100.0% | $11,711 | 10/31/2025 |
| | **Total** | **$11,711** | **-22.1%** | **2.3%** | **$11,711** | **-22.1%** | **$0** | **-100.0%** | **1** | **0.0%** | **100.0%** | **$11,711** | |
| Foremost Choice | Dwelling Fire | $18,327 | -12.8% | -52.5% | $18,327 | -6.7% | $2,206 | 6.4% | 14 | -6.7% | 87.5% | $1,309 | 10/31/2025 |
| | Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$18,327** | **-12.8%** | **-52.5%** | **$18,327** | **-6.7%** | **$2,206** | **6.4%** | **14** | **-6.7%** | **87.5%** | **$1,309** | |
| **Total** | **Total** | **$30,038** | **-16.7%** | **-29.8%** | **$30,038** | **-13.4%** | **$2,206** | **-21.6%** | **15** | **-6.3%** | **88.2%** | **$2,003** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 200 | 0 | $0 | 157 | 0 | $0 | 0.00 | 11 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **200** | **0** | **$0** | **157** | **0** | **0** | **0.00** | **11** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 15 | 1 | $1,664 | 13 | 1 | $1,664 | 0.08 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **15** | **1** | **$1,664** | **13** | **1** | **1,664** | **0.08** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **215** | **1** | **$1,664** | **170** | **1** | **1,664** | **0.01** | **11** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Jonathan Hunter

Role: LBE

LBE UPN:1278782

MATT GIELLO AGENCY

Address: 450 PARKWAY

BROOMALL PA 19008

Phone/Email: 6106238800 MGIELLO@GIELLOAGENCY.COM

# Agency Scorecard

**PA**

## 1278878, ANTHONY MERCADO AGENCY, LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $3,163 | -77.0% | 65.5% | $2,729 | -76.8% | $0 | -100.0% | 2 | -60.0% | 28.6% | $1,582 | 10/31/2025 |
| | **Total** | **$3,163** | **-77.0%** | **65.5%** | **$2,729** | **-76.8%** | **$0** | **-100.0%** | **2** | **-60.0%** | **28.6%** | **$1,582** | |
| Foremost Choice | Dwelling Fire | $18,492 | 67.1% | 9.2% | $7,336 | -12.2% | ($723) | 0.0% | 9 | 50.0% | 31.0% | $2,055 | 10/31/2025 |
| | Home | $10,857 | 99.5% | 2154.5% | $5,569 | 247.6% | $1,419 | 9999.9% | 4 | 100.0% | 66.7% | $2,714 | 10/31/2025 |
| | Mobile Home | $13,530 | 10.5% | 13.0% | $8,976 | -6.8% | $0 | 0.0% | 15 | 7.1% | 93.8% | $902 | 10/31/2025 |
| | Rental M.H. | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Travel Trailer | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$42,879** | **47.7%** | **498.9%** | **$21,881** | **10.2%** | **$696** | **9999.9%** | **28** | **27.3%** | **54.9%** | **$1,531** | |
| **Total** | **Total** | **$46,042** | **7.6%** | **422.1%** | **$24,610** | **-22.2%** | **$696** | **76.2%** | **30** | **11.1%** | **51.7%** | **$1,535** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 12 | 2 | $4,105 | 10 | 1 | $762 | 0.10 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **12** | **2** | **$4,105** | **10** | **1** | **762** | **0.10** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 37 | 23 | $59,806 | 22 | 10 | $22,037 | 0.45 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 15 | 4 | $5,798 | 14 | 3 | $4,438 | 0.21 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 4 | 2 | $836 | 4 | 2 | $836 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **56** | **29** | **$66,440** | **40** | **15** | **27,311** | **0.38** | **2** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **68** | **31** | **$70,545** | **50** | **16** | **28,073** | **0.32** | **2** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Abby Haas

Role: LBE

LBE UPN:1278878

ANTHONY MERCADO AGENCY, LLC

Address: 217 E MARKET ST

ORWIGSBURG PA 17961

Phone/Email: 5703662368 ANTHONY.MERCADO@MERCADOINSGROUP.COM

PA

# Agency Scorecard

## 1278882, MERCADO,ANTHONY

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $1,990 | 9999.9% | 11.3% | $1,094 | 9999.9% | $1,094 | 9999.9% | 1 | 9999.9% | 100.0% | $1,990 | 10/31/2025 |
| | Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $3,243 | 3.7% | 39.7% | $3,243 | 3.7% | $0 | -100.0% | 4 | 0.0% | 100.0% | $811 | 10/31/2025 |
| | **Total** | **$5,233** | **67.3%** | **34.9%** | **$4,337** | **38.7%** | **$1,094** | **-247.0%** | **5** | **25.0%** | **100.0%** | **$1,047** | |
| **Total** | **Total** | **$5,233** | **67.3%** | **34.9%** | **$4,337** | **38.7%** | **$1,094** | **-247.0%** | **5** | **25.0%** | **100.0%** | **$1,047** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 6 | 1 | $896 | 5 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 3 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **11** | **1** | **$896** | **8** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **11** | **1** | **$896** | **8** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Abby Haas

Role: SUB

LBE UPN:1278878

1278878

MERCADO,ANTHONY

Address: 217 E MARKET ST

ORWIGSBURG PA 17961

Phone/Email: 5703662368 ANTHONY.MERCADO@MERCADOINSGROUP.COM

# Agency Scorecard

**PA**

## 1280018, STASKO,SCOTT THOMAS

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $2,513 | 2.6% | 6.5% | $552 | -77.5% | $0 | 0.0% | 3 | 0.0% | 75.0% | $838 | 10/31/2025 |
| | Home | $622 | 9999.9% | 11.3% | $622 | 9999.9% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $12,486 | -25.5% | 12.9% | $10,055 | -24.3% | $1,934 | -12.5% | 16 | -15.8% | 69.6% | $780 | 10/31/2025 |
| | Motor Home | $692 | 9999.9% | 24.1% | $346 | 9999.9% | $346 | 9999.9% | 1 | 9999.9% | 100.0% | $692 | 10/31/2025 |
| | Rental M.H. | $1,895 | 6.1% | 27.6% | $1,139 | 5.1% | $0 | 0.0% | 3 | 0.0% | 100.0% | $632 | 10/31/2025 |
| | **Total** | **$18,208** | **-13.3%** | **13.6%** | **$12,714** | **-24.4%** | **$2,280** | **3.2%** | **23** | **-8.0%** | **69.7%** | **$792** | |
| **Total** | **Total** | **$18,208** | **-13.3%** | **13.2%** | **$12,714** | **-24.4%** | **$2,280** | **3.2%** | **23** | **-8.0%** | **69.7%** | **$792** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 3 | 1 | $965 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 4 | 2 | $3,535 | 3 | 2 | $3,535 | 0.67 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 5 | 4 | $2,085 | 4 | 4 | $2,085 | 1.00 | 1 | 1 | $466 | 100.0% | 10/31/2025 |
| | Motor Home | 1 | 1 | $346 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **13** | **8** | **$6,931** | **9** | **6** | **5,620** | **0.67** | **1** | **1** | **$466** | **100.0%** | |
| **Grand Total** | | **13** | **8** | **$6,931** | **9** | **6** | **5,620** | **0.67** | **1** | **1** | **$466** | **100.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Abby Haas

Role: LBE

LBE UPN:1280018

STASKO,SCOTT THOMAS

Address: 75 N MARKET ST

NANTICOKE PA 18634

Phone/Email: 5707355033 STASKOS@STASKOINSURANCE.COM

# Agency Scorecard

**PA**

## 1280687, VALERA AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $2,131 | 245.9% | 325.3% | $1,943 | 215.4% | $0 | -100.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$2,131** | **245.9%** | **325.3%** | **$1,943** | **215.4%** | **$0** | **-100.0%** | **0** | **-100.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $15,052 | 22.2% | 6.5% | $12,150 | 32.3% | $1,560 | 3.2% | 10 | 11.1% | 100.0% | $1,505 | 10/31/2025 |
| | Home | $3,442 | 124.8% | 10.2% | $3,442 | 124.8% | $1,796 | 9999.9% | 2 | 100.0% | 100.0% | $1,721 | 10/31/2025 |
| | Mobile Home | $11,689 | 22.0% | 39.0% | $10,078 | 11.4% | $0 | -100.0% | 15 | 15.4% | 93.8% | $779 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$30,183** | **28.8%** | **20.0%** | **$25,670** | **29.9%** | **$3,356** | **70.8%** | **27** | **17.4%** | **96.4%** | **$1,118** | |
| **Total** | **Total** | **$32,314** | **34.4%** | **48.8%** | **$27,613** | **35.5%** | **$3,356** | **30.0%** | **27** | **12.5%** | **84.4%** | **$1,197** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 102 | 3 | $2,844 | 75 | 2 | $1,943 | 0.03 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **102** | **3** | **$2,844** | **75** | **2** | **1,943** | **0.03** | **2** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 15 | 1 | $1,716 | 12 | 1 | $1,716 | 0.08 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 2 | 1 | $2,560 | 1 | 1 | $2,560 | 1.00 | 1 | 1 | $2,560 | 100.0% | 10/31/2025 |
| | Mobile Home | 5 | 3 | $2,868 | 5 | 3 | $2,868 | 0.60 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **22** | **5** | **$7,144** | **18** | **5** | **7,144** | **0.28** | **3** | **1** | **$2,560** | **33.3%** | |
| **Grand Total** | | **124** | **8** | **$9,988** | **93** | **7** | **9,087** | **0.08** | **5** | **1** | **$2,560** | **20.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Abby Haas

Role: LBE

LBE UPN:1280687

VALERA AGENCY INC

Address: 1640 BROOKSIDE RD

MACUNGIE PA 18062

Phone/Email: 4846614860 CLARAF@VALERAINS.COM

# Agency Scorecard

**PA**

## 1281039, STENNETT INS & FINANCIAL LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | -100.0% | 1788.1% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **-100.0%** | **1788.1%** | **$0** | **-100.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $3,396 | 1.4% | 6.0% | $2,073 | -38.1% | $0 | 0.0% | 3 | 0.0% | 100.0% | $1,132 | 10/31/2025 |
| | Mobile Home | $12,925 | 3.3% | 13.7% | $12,925 | 3.3% | $0 | -100.0% | 14 | 0.0% | 100.0% | $923 | 10/31/2025 |
| | Rental M.H. | $1,641 | 4.2% | 15.7% | $1,028 | -34.7% | $0 | 0.0% | 2 | 0.0% | 100.0% | $821 | 10/31/2025 |
| | **Total** | **$17,962** | **3.0%** | **12.4%** | **$16,026** | **-8.1%** | **$0** | **-100.0%** | **19** | **0.0%** | **100.0%** | **$945** | |
| **Total** | **Total** | **$17,962** | **1.2%** | **12.3%** | **$16,026** | **-9.7%** | **$0** | **-100.0%** | **19** | **0.0%** | **100.0%** | **$945** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1281039

STENNETT INS & FINANCIAL LLC

Address: 117 N ALLEGHENY ST

BELLEFONTE PA 16823

Phone/Email: 8142519886 BRIANSR@STENNETTINSURANCE.COM

PA

# Agency Scorecard

## 1283858, KUTNEY INSURANCE AGENCY, INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $29,736 | -26.7% | -4.2% | $21,482 | -38.0% | $3,514 | 18.6% | 7 | -46.2% | 50.0% | $4,248 | 10/31/2025 |
| | **Total** | **$29,736** | **-26.7%** | **-4.2%** | **$21,482** | **-38.0%** | **$3,514** | **18.6%** | **7** | **-46.2%** | **50.0%** | **$4,248** | |
| Foremost Choice | Dwelling Fire | $6,712 | -11.0% | 4.8% | $2,310 | -28.7% | ($1,658) | 0.0% | 5 | -28.6% | 62.5% | $1,342 | 10/31/2025 |
| | Home | $2,971 | -26.7% | 7.4% | $2,971 | -26.7% | $0 | 0.0% | 3 | 50.0% | 75.0% | $990 | 10/31/2025 |
| | Mobile Home | $23,995 | -13.9% | 130.7% | $18,152 | -16.6% | $2,393 | 1.4% | 30 | -11.8% | 83.3% | $800 | 10/31/2025 |
| | Motor Home | $1,000 | 0.6% | 11.4% | $1,000 | 0.6% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,000 | 10/31/2025 |
| | Motorcycle | $479 | 4.6% | 1.9% | $479 | 4.6% | $0 | 0.0% | 1 | 0.0% | 100.0% | $479 | 10/31/2025 |
| | Off-Road Veh | $412 | -2.8% | 3.5% | $412 | -2.8% | $0 | 0.0% | 1 | 0.0% | 100.0% | $412 | 10/31/2025 |
| | Rental M.H. | $4,869 | 0.8% | 13.7% | $4,869 | 42.0% | $1,275 | 2.4% | 5 | 0.0% | 83.3% | $974 | 10/31/2025 |
| | **Total** | **$40,438** | **-12.4%** | **79.6%** | **$30,193** | **-12.1%** | **$2,010** | **-44.3%** | **46** | **-9.8%** | **80.7%** | **$879** | |
| **Total** | **Total** | **$70,174** | **-19.1%** | **42.6%** | **$51,675** | **-25.1%** | **$5,524** | **-15.9%** | **53** | **-17.2%** | **74.6%** | **$1,324** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 722 | 1 | $1,792 | 614 | 1 | $1,792 | 0.00 | 66 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **722** | **1** | **$1,792** | **614** | **1** | **1,792** | **0.00** | **66** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 19 | 1 | $1,658 | 13 | 1 | $1,658 | 0.08 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 7 | 2 | $1,699 | 7 | 2 | $1,699 | 0.29 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 13 | 2 | $683 | 12 | 2 | $683 | 0.17 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 2 | 1 | $1,539 | 2 | 1 | $1,539 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **41** | **6** | **$5,579** | **34** | **6** | **5,579** | **0.18** | **2** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **763** | **7** | **$7,371** | **648** | **7** | **7,371** | **0.01** | **68** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Abby Haas

Role: LBE

LBE UPN:1283858

KUTNEY INSURANCE AGENCY, INC

Address: 2495 E 3RD ST

WILLIAMSPORT PA 17701

Phone/Email: 5703228909 MIKE@KUTNEYINSURANCE.COM

# Agency Scorecard

**PA**

## 1283885, KUTNEY INSURANCE AGENCY, INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $2,487 | 4.5% | 6.4% | $2,487 | 4.5% | $0 | 0.0% | 3 | 0.0% | 100.0% | $829 | 10/31/2025 |
| | Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $2,651 | -44.7% | 11.6% | $3,853 | -19.6% | $0 | 0.0% | 4 | -20.0% | 80.0% | $663 | 10/31/2025 |
| | **Total** | **$5,138** | **-28.4%** | **9.6%** | **$6,340** | **-11.6%** | **$0** | **0.0%** | **7** | **-12.5%** | **87.5%** | **$734** | |
| **Total** | **Total** | **$5,138** | **-28.4%** | **9.6%** | **$6,340** | **-11.6%** | **$0** | **0.0%** | **7** | **-12.5%** | **87.5%** | **$734** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Abby Haas

Role: SUB

LBE UPN:1283858

1283858

KUTNEY INSURANCE AGENCY, INC

Address: 2495 E 3RD ST

WILLIAMSPORT PA 17701

Phone/Email: 5706382179 MIKE@KUTNEYINSURANCE.COM

# Agency Scorecard

**PA**

## 1288238, VU AGENCY LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $2 | -99.8% | -307.0% | $0 | -100.0% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$2** | **-99.8%** | **-307.0%** | **$0** | **-100.0%** | **$0** | **0.0%** | **0** | **-100.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $209,634 | 60.6% | 9.8% | $194,086 | 60.3% | $20,637 | 43.1% | 176 | 64.5% | 88.9% | $1,191 | 10/31/2025 |
| | Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$209,634** | **60.6%** | **9.8%** | **$194,086** | **60.3%** | **$20,637** | **43.1%** | **176** | **64.5%** | **88.9%** | **$1,191** | |
| **Total** | **Total** | **$209,636** | **59.3%** | **9.4%** | **$194,086** | **59.5%** | **$20,637** | **43.1%** | **176** | **63.0%** | **88.4%** | **$1,191** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 305 | 91 | $109,676 | 252 | 81 | $98,570 | 0.32 | 24 | 6 | $6,753 | 25.0% | 10/31/2025 |
| | Home | 1 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **307** | **91** | **$109,676** | **253** | **81** | **98,570** | **0.32** | **24** | **6** | **$6,753** | **25.0%** | |
| **Grand Total** | | **307** | **91** | **$109,676** | **253** | **81** | **98,570** | **0.32** | **24** | **6** | **$6,753** | **25.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner
Portfolio Owner: Keith Long
Role: LBE
LBE UPN:1288238

VU AGENCY LLC
Address: 5406 HOWLAND ST
PHILADELPHIA PA 19124
Phone/Email: 2157438620 VUAGENCY@GMAIL.COM

# Agency Scorecard

**PA**

## 1288253, MYLET & MUSSELMAN INSURANCE GROUP LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $10,308 | 10.1% | 6.6% | $6,585 | -7.1% | $0 | 0.0% | 6 | 0.0% | 100.0% | $1,718 | 10/31/2025 |
| | Home | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $4,374 | 34.2% | 16.2% | $4,374 | 34.2% | $1,071 | 9999.9% | 5 | 25.0% | 125.0% | $875 | 10/31/2025 |
| | Rental M.H. | $818 | 2.0% | 12.8% | $818 | 2.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $818 | 10/31/2025 |
| | **Total** | **$15,500** | **12.1%** | **9.0%** | **$11,777** | **2.0%** | **$1,071** | **9999.9%** | **12** | **9.1%** | **109.1%** | **$1,292** | |
| **Total** | **Total** | **$15,500** | **12.1%** | **9.0%** | **$11,777** | **2.0%** | **$1,071** | **9999.9%** | **12** | **9.1%** | **109.1%** | **$1,292** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **1** | **0** | **$0** | **1** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 2 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **2** | **0** | **$0** | **1** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **3** | **0** | **$0** | **2** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner
Portfolio Owner: Abby Haas
Role: LBE
LBE UPN:1288253

MYLET & MUSSELMAN INSURANCE GROUP LLC
Address: 147 N 4TH ST
GETTYSBURG PA 17325
Phone/Email: 7173341161 JILLIAN@MYLETMUSSELMAN.COM

# Agency Scorecard

**PA**

## 1288255, STRUBLE,JILLIAN

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Mobile Home | $2,139 | 5.9% | 22.8% | $2,139 | 5.9% | $0 | 0.0% | 1 | 0.0% | 100.0% | $2,139 | 10/31/2025 |
| | **Total** | **$2,139** | **5.9%** | **22.8%** | **$2,139** | **5.9%** | **$0** | **0.0%** | **1** | **0.0%** | **100.0%** | **$2,139** | |
| **Total** | **Total** | **$2,139** | **5.9%** | **22.8%** | **$2,139** | **5.9%** | **$0** | **0.0%** | **1** | **0.0%** | **100.0%** | **$2,139** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Abby Haas

Role: SUB

LBE UPN:1288253

1288253

STRUBLE,JILLIAN

Address: 147 CARLISLE ST

GETTYSBURG PA 17325

Phone/Email: 7173341161 JILLIAN@MYLETMUSSELMAN.COM

# Agency Scorecard

**PA**

## 1288258, MYLET & MUSSELMAN INSURANCE GROUP LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $3,698 | 9999.9% | 32.5% | $1,870 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $3,698 | 10/31/2025 |
| | **Total** | **$3,698** | **9999.9%** | **32.5%** | **$1,870** | **9999.9%** | **$0** | **0.0%** | **1** | **9999.9%** | **100.0%** | **$3,698** | |
| **Total** | **Total** | **$3,698** | **9999.9%** | **32.5%** | **$1,870** | **9999.9%** | **$0** | **0.0%** | **1** | **9999.9%** | **100.0%** | **$3,698** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 10 | 1 | $1,828 | 6 | 0 | $0 | 0.00 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **10** | **1** | **$1,828** | **6** | **0** | **0** | **0.00** | **2** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **10** | **1** | **$1,828** | **6** | **0** | **0** | **0.00** | **2** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Abby Haas

Role: SUB

LBE UPN:1288253

1288253

MYLET & MUSSELMAN INSURANCE GROUP LLC

Address: 59 S MOUNTAIN BLVD

MOUNTAIN TOP PA 18707

Phone/Email: 5074746626 JILLIAN@MYLETMUSSELMAN.COM

# Agency Scorecard

**PA**

## 1288263, STRUBLE,JILLIAN

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| **Total** | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Abby Haas

Role: SUB

LBE UPN:1288253

1288258

STRUBLE,JILLIAN

Address: 59 S MOUNTAIN BLVD

MOUNTAIN TOP PA 18707

Phone/Email: 7173341161 JILLIAN@MYLETMUSSELMAN.COM

# Agency Scorecard

**PA**

## 1288437, GASBARRO INSURANCE AGENCY, LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $99,312 | 42.5% | 48.6% | $80,232 | 43.1% | $14,804 | 51.6% | 87 | 42.6% | 86.1% | $1,142 | 10/31/2025 |
| | Home | $12,353 | 231.8% | 7.0% | $12,353 | 231.8% | $5,943 | 185.6% | 5 | 150.0% | 71.4% | $2,471 | 10/31/2025 |
| | Mobile Home | $22,500 | 19.7% | 178.1% | $20,317 | 27.4% | $2,604 | -34.8% | 25 | 25.0% | 80.6% | $900 | 10/31/2025 |
| | Off-Road Veh | $75 | 0.0% | 3.0% | $75 | 0.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $75 | 10/31/2025 |
| | Rental M.H. | $3,143 | 0.9% | 13.3% | $2,570 | -17.5% | $813 | 2.1% | 5 | -16.7% | 71.4% | $629 | 10/31/2025 |
| | **Total** | **$137,383** | **44.0%** | **70.9%** | **$115,547** | **46.4%** | **$24,164** | **45.3%** | **123** | **36.7%** | **83.7%** | **$1,117** | |
| **Total** | **Total** | **$137,383** | **44.0%** | **70.9%** | **$115,547** | **46.4%** | **$24,164** | **45.3%** | **123** | **36.7%** | **83.7%** | **$1,117** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 83 | 40 | $41,021 | 69 | 32 | $33,593 | 0.46 | 6 | 4 | $4,048 | 66.7% | 10/31/2025 |
| | Home | 6 | 5 | $8,881 | 6 | 5 | $8,881 | 0.83 | 2 | 2 | $3,817 | 100.0% | 10/31/2025 |
| | Mobile Home | 14 | 11 | $9,761 | 14 | 11 | $9,761 | 0.79 | 1 | 1 | $991 | 100.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 1 | $517 | 1 | 1 | $517 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **104** | **57** | **$60,180** | **90** | **49** | **52,752** | **0.54** | **9** | **7** | **$8,856** | **77.8%** | |
| **Grand Total** | | **104** | **57** | **$60,180** | **90** | **49** | **52,752** | **0.54** | **9** | **7** | **$8,856** | **77.8%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Donald Krafjack

Role: LBE

LBE UPN:1288437

GASBARRO INSURANCE AGENCY, LLC

Address: 215 N PITTSBURGH ST STE A

CONNELLSVILLE PA 15425

Phone/Email: 7246288744 DAVE@GASBARROINSURANCE.COM

# Agency Scorecard

**PA**

## 1290217, HOPKINS-CALCEK,KRISTIN RANEE

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $3,542 | -12.2% | 0.8% | $1,778 | 41.7% | $0 | 0.0% | 1 | -50.0% | 50.0% | $3,542 | 10/31/2025 |
| | **Total** | **$3,542** | **-12.2%** | **0.8%** | **$1,778** | **41.7%** | **$0** | **0.0%** | **1** | **-50.0%** | **50.0%** | **$3,542** | |
| Foremost Choice | Dwelling Fire | $5,183 | -0.3% | 7.9% | $5,183 | 71.1% | $1,082 | 2.2% | 4 | 33.3% | 100.0% | $1,296 | 10/31/2025 |
| | Home | $1,088 | -61.0% | 6.8% | ($465) | -116.7% | $0 | 0.0% | 1 | -50.0% | 50.0% | $1,088 | 10/31/2025 |
| | Mobile Home | $1,656 | 2.3% | 11.4% | $1,656 | 2.3% | $0 | 0.0% | 2 | 0.0% | 100.0% | $828 | 10/31/2025 |
| | Rental M.H. | $703 | 1.9% | 12.8% | $703 | 1.9% | $0 | 0.0% | 1 | 0.0% | 100.0% | $703 | 10/31/2025 |
| | Travel Trailer | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$8,630** | **-14.5%** | **8.6%** | **$7,077** | **-10.6%** | **$1,082** | **2.2%** | **8** | **0.0%** | **88.9%** | **$1,079** | |
| **Total** | **Total** | **$12,172** | **-13.8%** | **6.2%** | **$8,855** | **-3.5%** | **$1,082** | **2.2%** | **9** | **-10.0%** | **81.8%** | **$1,352** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 2 | 1 | $1,694 | 2 | 1 | $1,694 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **2** | **1** | **$1,694** | **2** | **1** | **1,694** | **0.50** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **2** | **1** | **$1,694** | **2** | **1** | **1,694** | **0.50** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Elizabeth Wilkinson

Role: LBE

LBE UPN:1290217

HOPKINS-CALCEK,KRISTIN RANEE

Address: 115 THORNTON RD REAR

BROWNSVILLE PA 15417

Phone/Email: 7247859596 KRISTIN@KRISTINHOPKINSAGENCY.COM

PA

# Agency Scorecard

## 1291406, DIMEGLIO INSURANCE ASSOC INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $7,032 | -52.4% | -11.9% | $5,933 | 33.4% | $0 | -100.0% | 4 | 100.0% | 80.0% | $1,758 | 10/31/2025 |
| | **Total** | **$7,032** | **-53.9%** | **-11.9%** | **$5,933** | **20.8%** | **$0** | **-100.0%** | **4** | **100.0%** | **80.0%** | **$1,758** | |
| Foremost Choice | Dwelling Fire | $3,768 | 39.7% | 8.5% | $3,768 | 39.7% | $0 | 0.0% | 2 | 0.0% | 66.7% | $1,884 | 10/31/2025 |
| | **Total** | **$3,768** | **39.7%** | **8.5%** | **$3,768** | **39.7%** | **$0** | **0.0%** | **2** | **0.0%** | **66.7%** | **$1,884** | |
| **Total** | **Total** | **$10,800** | **-39.8%** | **-4.8%** | **$9,701** | **27.5%** | **$0** | **-100.0%** | **6** | **50.0%** | **75.0%** | **$1,800** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 80 | 3 | $2,682 | 75 | 3 | $2,682 | 0.04 | 3 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **81** | **3** | **$2,682** | **76** | **3** | **2,682** | **0.04** | **3** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 10 | 1 | $2,687 | 10 | 1 | $2,687 | 0.10 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **10** | **1** | **$2,687** | **10** | **1** | **2,687** | **0.10** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **91** | **4** | **$5,369** | **86** | **4** | **5,369** | **0.05** | **3** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Keith Long

Role: LBE

LBE UPN:1291406

DIMEGLIO INSURANCE ASSOC INC

Address: 14 BROOKLINE BLVD

HAVERTOWN PA 19083

Phone/Email: 6107896131 DAVE@DIMEGLIOAGENCY.COM

PA

# Agency Scorecard

## 1292157, DIMEGLIO INSURANCE ASSOC INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 999.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **999.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $14,043 | -8.4% | 7.8% | $11,324 | -10.4% | $2,194 | 1.2% | 9 | -10.0% | 90.0% | $1,560 | 10/31/2025 |
| | **Total** | **$14,043** | **-8.4%** | **7.8%** | **$11,324** | **-10.4%** | **$2,194** | **1.2%** | **9** | **-10.0%** | **90.0%** | **$1,560** | |
| **Total** | **Total** | **$14,043** | **-8.4%** | **8.2%** | **$11,324** | **-10.4%** | **$2,194** | **1.2%** | **9** | **-10.0%** | **90.0%** | **$1,560** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **2** | **0** | **$0** | **2** | **0** | **0** | **0.00** | **1** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **2** | **0** | **$0** | **2** | **0** | **0** | **0.00** | **1** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Keith Long

Role: SUB

LBE UPN:1291406

1291406

DIMEGLIO INSURANCE ASSOC INC

Address: 4554 RISING SUN AVE

PHILADELPHIA PA 19140

Phone/Email: 2154572911 MSANTIAGO@DIMEGLIOAGENCY.COM

# Agency Scorecard

**PA**

## 1296712, ALLING AGENCY, LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $10,650 | 50.5% | 144.8% | $9,497 | -6.3% | $3,202 | 23.1% | 2 | -33.3% | 40.0% | $5,325 | 10/31/2025 |
| | **Total** | **$10,650** | **50.5%** | **144.8%** | **$9,497** | **-6.3%** | **$3,202** | **23.1%** | **2** | **-33.3%** | **40.0%** | **$5,325** | |
| Foremost Choice | Dwelling Fire | $41,694 | 152.4% | 10.9% | $40,373 | 152.7% | $13,856 | 756.9% | 20 | 53.8% | 71.4% | $2,085 | 10/31/2025 |
| | Home | $1,490 | 33.8% | 10.6% | $1,490 | 33.8% | $0 | -100.0% | 2 | 100.0% | 66.7% | $745 | 10/31/2025 |
| | Mobile Home | $4,092 | 23.9% | 13.4% | $4,092 | 23.9% | $0 | -100.0% | 6 | 20.0% | 100.0% | $682 | 10/31/2025 |
| | Motor Home | $817 | -8.5% | 11.9% | $0 | 0.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $817 | 10/31/2025 |
| | Rental M.H. | $582 | 2.3% | 12.9% | $582 | 2.3% | $0 | 0.0% | 1 | 0.0% | 100.0% | $582 | 10/31/2025 |
| | Travel Trailer | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$48,675** | **117.3%** | **11.4%** | **$46,537** | **122.0%** | **$13,856** | **644.5%** | **30** | **42.9%** | **76.9%** | **$1,623** | |
| **Total** | **Total** | **$59,325** | **101.3%** | **47.7%** | **$56,034** | **80.2%** | **$17,058** | **282.2%** | **32** | **33.3%** | **72.7%** | **$1,854** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 1 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 94 | 2 | $2,752 | 73 | 2 | $2,752 | 0.03 | 3 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **95** | **2** | **$2,752** | **73** | **2** | **2,752** | **0.03** | **3** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 60 | 15 | $38,559 | 46 | 14 | $36,074 | 0.30 | 10 | 5 | $16,885 | 50.0% | 10/31/2025 |
| | Home | 4 | 2 | $1,948 | 3 | 2 | $1,948 | 0.67 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 3 | 1 | $577 | 3 | 1 | $577 | 0.33 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **67** | **18** | **$41,084** | **52** | **17** | **38,599** | **0.33** | **12** | **5** | **$16,885** | **41.7%** | |
| **Grand Total** | | **162** | **20** | **$43,836** | **125** | **19** | **41,351** | **0.15** | **15** | **5** | **$16,885** | **33.3%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Donald Krafjack

Role: LBE

LBE UPN:1296712

ALLING AGENCY, LLC

Address: 4790 WILLIAM FLYNN HWY

ALLISON PARK PA 15101

Phone/Email: 7244493993 WAYNE@ALLINGAGENCYLLC.COM

# Agency Scorecard

**PA**

## 1309524, PANICHELLE FINANCIAL GROUP LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | ($29) | -101.7% | -65.4% | ($29) | -101.7% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **($29)** | **-101.7%** | **-65.4%** | **($29)** | **-101.7%** | **$0** | **0.0%** | **0** | **-100.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $54,149 | 17.7% | 14.4% | $45,270 | 16.0% | $179 | -92.8% | 54 | -8.5% | 85.7% | $1,003 | 10/31/2025 |
| | Home | $4,192 | 158.4% | 7.6% | $2,243 | 60.3% | $2,140 | 9999.9% | 2 | 100.0% | 66.7% | $2,096 | 10/31/2025 |
| | Mobile Home | $59,306 | 0.8% | 16.4% | $52,041 | -0.7% | $1,083 | -58.0% | 73 | -6.4% | 91.3% | $812 | 10/31/2025 |
| | Motorcycle | $3,261 | -0.5% | 3.5% | $3,122 | -2.3% | $0 | 0.0% | 18 | -5.3% | 94.7% | $181 | 10/31/2025 |
| | Off-Road Veh | $397 | -2.7% | 3.6% | $322 | -3.3% | $0 | 0.0% | 5 | 0.0% | 100.0% | $79 | 10/31/2025 |
| | Rental M.H. | $4,426 | -5.6% | 17.4% | $4,426 | -5.6% | $0 | 0.0% | 12 | -7.7% | 92.3% | $369 | 10/31/2025 |
| | Travel Trailer | $1,050 | -1.9% | 11.8% | $1,050 | -1.9% | $0 | 0.0% | 4 | 0.0% | 100.0% | $263 | 10/31/2025 |
| | **Total** | **$126,781** | **9.4%** | **15.0%** | **$108,474** | **6.2%** | **$3,402** | **-32.7%** | **168** | **-6.1%** | **89.8%** | **$755** | |
| **Total** | **Total** | **$126,752** | **7.8%** | **14.5%** | **$108,445** | **4.4%** | **$3,402** | **-32.7%** | **168** | **-6.7%** | **89.4%** | **$754** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 14 | 4 | $8,453 | 14 | 4 | $8,453 | 0.29 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 6 | 2 | $3,079 | 4 | 1 | $1,130 | 0.25 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 6 | 2 | $1,469 | 4 | 2 | $1,469 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **29** | **8** | **$13,001** | **25** | **7** | **11,052** | **0.28** | **1** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **29** | **8** | **$13,001** | **25** | **7** | **11,052** | **0.28** | **1** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Elizabeth Wilkinson

Role: LBE

LBE UPN:1309524

PANICHELLE FINANCIAL GROUP LLC

Address: 5960 STATE ROUTE 981

LATROBE PA 15650

Phone/Email: 7243272600 RON@MYPFG.COM

PA

# Agency Scorecard

## 1324763, BOATWRIGHT PROFESSIONAL & FINANCIAL SERVICES, LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $5,343 | -2.6% | 9.4% | $5,343 | -2.6% | $2,019 | 774.0% | 2 | 0.0% | 66.7% | $2,672 | 10/31/2025 |
| | Home | $1,384 | 227.2% | 16.3% | $1,384 | 227.2% | $886 | 109.5% | 2 | 100.0% | 100.0% | $692 | 10/31/2025 |
| | Marine | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $7,062 | -1.3% | 16.9% | $6,152 | 4.4% | $1,903 | -30.3% | 9 | 0.0% | 100.0% | $785 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Off-Road Veh | $289 | -14.5% | 7.5% | $289 | -14.5% | $0 | 0.0% | 1 | 0.0% | 100.0% | $289 | 10/31/2025 |
| | Travel Trailer | $488 | -9.5% | 12.8% | $488 | -9.5% | $0 | 0.0% | 2 | 0.0% | 100.0% | $244 | 10/31/2025 |
| | **Total** | **$14,566** | **4.5%** | **13.7%** | **$13,656** | **7.7%** | **$4,808** | **42.1%** | **16** | **6.7%** | **94.1%** | **$910** | |
| **Total** | **Total** | **$14,566** | **4.5%** | **13.7%** | **$13,656** | **7.7%** | **$4,808** | **42.1%** | **16** | **6.7%** | **94.1%** | **$910** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 4 | 1 | $1,866 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 3 | 1 | $886 | 3 | 1 | $886 | 0.33 | 2 | 1 | $886 | 50.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **10** | **2** | **$2,752** | **9** | **1** | **886** | **0.11** | **2** | **1** | **$886** | **50.0%** | |
| **Grand Total** | | **10** | **2** | **$2,752** | **9** | **1** | **886** | **0.11** | **2** | **1** | **$886** | **50.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Keith Long

Role: LBE

LBE UPN:1324763

BOATWRIGHT PROFESSIONAL & FINANCIAL SERVICES, LLC

Address: 3415 W CHESTER PIKE STE 201

NEWTOWN SQUARE PA 19073

Phone/Email: 6103599270 ROGER@BOATWRIGHTAGENCY.COM

PA

# Agency Scorecard

## 1345207, THE ORRINO AGENCY, INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $82,736 | -25.7% | 62.1% | $75,912 | -18.8% | $854 | -88.5% | 34 | -26.1% | 44.2% | $2,433 | 10/31/2025 |
| | **Total** | **$82,736** | **-25.7%** | **62.1%** | **$75,912** | **-18.8%** | **$854** | **-88.5%** | **34** | **-26.1%** | **44.2%** | **$2,433** | |
| Foremost Choice | Dwelling Fire | $55,952 | -19.0% | 247.0% | $41,401 | -30.8% | $1,357 | -40.4% | 35 | 25.0% | 56.5% | $1,599 | 10/31/2025 |
| | Home | $6,839 | 142.8% | 13.7% | $6,839 | 142.8% | $2,180 | 29.8% | 4 | 300.0% | 80.0% | $1,710 | 10/31/2025 |
| | **Total** | **$62,791** | **-12.6%** | **235.3%** | **$48,240** | **-22.9%** | **$3,537** | **-10.5%** | **39** | **34.5%** | **58.2%** | **$1,610** | |
| **Total** | **Total** | **$145,527** | **-20.6%** | **133.6%** | **$124,152** | **-20.5%** | **$4,391** | **-61.5%** | **73** | **-2.7%** | **50.7%** | **$1,994** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 111 | 31 | $41,577 | 89 | 27 | $36,734 | 0.30 | 12 | 1 | $1,356 | 8.3% | 10/31/2025 |
| | **Total** | **111** | **31** | **$41,577** | **89** | **27** | **36,734** | **0.30** | **12** | **1** | **$1,356** | **8.3%** | |
| Foremost Choice | Dwelling Fire | 81 | 34 | $68,739 | 60 | 28 | $53,084 | 0.47 | 5 | 2 | $2,191 | 40.0% | 10/31/2025 |
| | Home | 11 | 4 | $5,084 | 8 | 4 | $5,084 | 0.50 | 2 | 2 | $2,180 | 100.0% | 10/31/2025 |
| | **Total** | **92** | **38** | **$73,823** | **68** | **32** | **58,168** | **0.47** | **7** | **4** | **$4,371** | **57.1%** | |
| **Grand Total** | | **203** | **69** | **$115,400** | **157** | **59** | **94,902** | **0.38** | **19** | **5** | **$5,727** | **26.3%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Keith Long

Role: LBE

LBE UPN:1345207

THE ORRINO AGENCY, INC

Address: 1780 KENDARBREN DR STE 112

JAMISON PA 18929

Phone/Email: 2157100660 ORRINOT@ORRINOAGENCY.COM

PA

# Agency Scorecard

## 1360633, ERWIN AGENCY, LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $26,463 | -38.8% | 16.8% | $23,675 | -39.4% | $2,645 | -70.1% | 9 | -47.1% | 42.9% | $2,940 | 10/31/2025 |
| | **Total** | **$26,463** | **-38.8%** | **16.8%** | **$23,675** | **-39.4%** | **$2,645** | **-70.1%** | **9** | **-47.1%** | **42.9%** | **$2,940** | |
| Foremost Choice | Dwelling Fire | $94,458 | 10.3% | 11.0% | $74,140 | -5.4% | $5,482 | -62.8% | 70 | 4.5% | 64.8% | $1,349 | 10/31/2025 |
| | Home | $13,483 | 274.9% | 10.0% | $11,217 | 211.9% | $0 | 0.0% | 7 | 250.0% | 77.8% | $1,926 | 10/31/2025 |
| | Marine | $143 | 2.9% | 21.1% | $143 | 2.9% | $0 | 0.0% | 1 | 0.0% | 100.0% | $143 | 10/31/2025 |
| | Mobile Home | $18,089 | 1.1% | 14.4% | $13,759 | -10.6% | $2,521 | -39.9% | 27 | -3.6% | 87.1% | $670 | 10/31/2025 |
| | Motor Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $551 | 7.4% | 6.6% | $551 | 7.4% | $0 | 0.0% | 3 | 0.0% | 100.0% | $184 | 10/31/2025 |
| | Off-Road Veh | $75 | -341.9% | 6195.9% | $75 | -52.8% | $0 | 0.0% | 1 | -50.0% | 50.0% | $75 | 10/31/2025 |
| | Rental M.H. | $1,418 | -4.7% | 130.0% | $1,418 | 6.2% | $451 | 2.3% | 2 | 0.0% | 100.0% | $709 | 10/31/2025 |
| | Travel Trailer | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$128,217** | **17.6%** | **20.0%** | **$101,303** | **1.7%** | **$8,454** | **-56.4%** | **111** | **5.7%** | **71.2%** | **$1,155** | |
| **Total** | **Total** | **$154,680** | **1.6%** | **19.2%** | **$124,978** | **-9.9%** | **$11,099** | **-60.7%** | **120** | **-1.6%** | **67.8%** | **$1,289** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 931 | 4 | $9,488 | 702 | 2 | $5,459 | 0.00 | 34 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **933** | **4** | **$9,488** | **704** | **2** | **5,459** | **0.00** | **36** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 146 | 41 | $80,871 | 124 | 34 | $57,340 | 0.27 | 9 | 1 | $1,450 | 11.1% | 10/31/2025 |
| | Home | 40 | 7 | $9,540 | 36 | 5 | $6,127 | 0.14 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 16 | 3 | $1,764 | 14 | 2 | $1,203 | 0.14 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 3 | 0 | $0 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 5 | 0 | $0 | 5 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **211** | **51** | **$92,175** | **183** | **41** | **64,670** | **0.22** | **11** | **1** | **$1,450** | **9.1%** | |
| **Grand Total** | | **1,144** | **55** | **$101,663** | **887** | **43** | **70,129** | **0.05** | **47** | **1** | **$1,450** | **2.1%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Jen Rongione

Role: LBE

LBE UPN:1360633

ERWIN AGENCY, LLC

Address: 242 W CHOCOLATE AVE

HERSHEY PA 17033

Phone/Email: 7175335579 ERWINC1@ERWINLLC.COM

# Agency Scorecard

**PA**

## 1360986, THE KAREEM JONES AGENCY, LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | ($34) | -103.6% | -30.1% | $0 | -100.0% | $0 | -100.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **($34)** | **-103.6%** | **-30.1%** | **$0** | **-100.0%** | **$0** | **-100.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $4,148 | 318.1% | 11.2% | $2,593 | 161.4% | $0 | 0.0% | 2 | 100.0% | 100.0% | $2,074 | 10/31/2025 |
| | Home | $225 | 9999.9% | 11.4% | ($1,209) | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | ($444) | -157.1% | -18.9% | $0 | -100.0% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$3,929** | **122.0%** | **10.0%** | **$1,384** | **-21.8%** | **$0** | **0.0%** | **2** | **0.0%** | **50.0%** | **$1,965** | |
| **Total** | **Total** | **$3,895** | **43.2%** | **10.5%** | **$1,384** | **-50.3%** | **$0** | **-100.0%** | **2** | **0.0%** | **50.0%** | **$1,948** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 4 | 0 | $0 | 4 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **4** | **0** | **$0** | **4** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 5 | 1 | $1,555 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 2 | 1 | $1,434 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **7** | **2** | **$2,989** | **1** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **11** | **2** | **$2,989** | **5** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1360986

THE KAREEM JONES AGENCY, LLC

Address: 2470 BRODHEAD RD STE 2

ALIQUIPPA PA 15001

Phone/Email: 7243782519 JONESK94@KAREEMJONESAGENCY.COM

PA

# Agency Scorecard

## 1361357, DAVIS,MICHAEL S

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $6,305 | -0.4% | 152.4% | $4,861 | -5.4% | $0 | -100.0% | 3 | -25.0% | 75.0% | $2,102 | 10/31/2025 |
| | **Total** | **$6,305** | **-0.4%** | **152.4%** | **$4,861** | **-5.4%** | **$0** | **-100.0%** | **3** | **-25.0%** | **75.0%** | **$2,102** | |
| Foremost Choice | Mobile Home | $1,451 | 8.4% | 13.0% | $1,451 | 8.4% | $0 | 0.0% | 2 | 0.0% | 100.0% | $726 | 10/31/2025 |
| | Motorcycle | $453 | -60.6% | -7.4% | $421 | -54.0% | $304 | -1547.6% | 3 | -40.0% | 60.0% | $151 | 10/31/2025 |
| | Off-Road Veh | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Travel Trailer | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$1,904** | **-23.5%** | **5.7%** | **$1,872** | **-16.9%** | **$304** | **-1547.6%** | **5** | **-28.6%** | **71.4%** | **$381** | |
| **Total** | **Total** | **$8,209** | **-6.9%** | **116.4%** | **$6,733** | **-8.9%** | **$304** | **-19.8%** | **8** | **-27.3%** | **72.7%** | **$1,026** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **1** | **0** | **$0** | **1** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **1** | **0** | **$0** | **1** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Elizabeth Wilkinson

Role: LBE

LBE UPN:1361357

DAVIS,MICHAEL S

Address: 329 N WALNUT ST

BLAIRSVILLE PA 15717

Phone/Email: 7244599620 MIKE@MSDAVISINSURANCE.COM

# Agency Scorecard

**PA**

**1361508, DIRUGERIS,ROCHELLE L**

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $46,757 | 4.0% | 7.9% | $41,412 | 3.9% | $2,099 | 141.5% | 30 | 15.4% | 93.8% | $1,559 | 10/31/2025 |
| | Home | $4,115 | -15.2% | 8.6% | $4,115 | -15.2% | $0 | 0.0% | 2 | 0.0% | 66.7% | $2,058 | 10/31/2025 |
| | Marine | $1,021 | 25.3% | 2325.1% | $1,021 | 25.3% | $0 | 0.0% | 3 | 50.0% | 100.0% | $340 | 10/31/2025 |
| | Mobile Home | $4,833 | 58.1% | 20.3% | $4,156 | 21.6% | $0 | -100.0% | 6 | 20.0% | 100.0% | $806 | 10/31/2025 |
| | Motorcycle | $439 | -12.5% | 8.9% | $439 | -12.5% | $0 | 0.0% | 3 | 0.0% | 100.0% | $146 | 10/31/2025 |
| | Off-Road Veh | $150 | 0.0% | 4.6% | $75 | -50.0% | $0 | 0.0% | 2 | 0.0% | 100.0% | $75 | 10/31/2025 |
| | Travel Trailer | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$57,315** | **5.5%** | **47.2%** | **$51,218** | **3.3%** | **$2,099** | **148.4%** | **46** | **15.0%** | **93.9%** | **$1,246** | |
| **Total** | **Total** | **$57,315** | **5.5%** | **47.2%** | **$51,218** | **3.3%** | **$2,099** | **148.4%** | **46** | **15.0%** | **93.9%** | **$1,246** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 22 | 6 | $9,096 | 17 | 5 | $7,936 | 0.29 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 4 | 1 | $1,604 | 4 | 1 | $1,604 | 0.25 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 1 | 1 | $190 | 1 | 1 | $190 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 1 | 1 | $677 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **29** | **9** | **$11,567** | **23** | **7** | **9,730** | **0.30** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **29** | **9** | **$11,567** | **23** | **7** | **9,730** | **0.30** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Keith Long

Role: LBE

LBE UPN:1361508

DIRUGERIS,ROCHELLE L

Address: 118 N STATE ST

NEWTOWN PA 18940

Phone/Email: 2159429135 RLDAGENCY@OUTLOOK.COM

# Agency Scorecard

**PA**

**1363161, ROSEN,JORDAN**

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Home | $2,032 | 9999.9% | 13.8% | $2,032 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $2,032 | 10/31/2025 |
| | Mobile Home | $1,054 | 2.3% | 1124.1% | $1,054 | 2.3% | $0 | 0.0% | 2 | 0.0% | 100.0% | $527 | 10/31/2025 |
| | Motorcycle | $209 | -81.4% | -0.2% | $522 | -34.1% | $0 | -100.0% | 1 | -50.0% | 50.0% | $209 | 10/31/2025 |
| | Rental M.H. | $683 | 7.4% | 18.6% | $683 | 7.4% | $0 | 0.0% | 1 | 0.0% | 100.0% | $683 | 10/31/2025 |
| | **Total** | **$3,978** | **42.6%** | **418.7%** | **$4,291** | **74.6%** | **$0** | **-100.0%** | **5** | **0.0%** | **83.3%** | **$796** | |
| **Total** | **Total** | **$3,978** | **42.6%** | **418.7%** | **$4,291** | **74.6%** | **$0** | **-100.0%** | **5** | **0.0%** | **83.3%** | **$796** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 2 | 1 | $2,032 | 2 | 1 | $2,032 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **3** | **1** | **$2,032** | **3** | **1** | **2,032** | **0.33** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **3** | **1** | **$2,032** | **3** | **1** | **2,032** | **0.33** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1363161

ROSEN,JORDAN

Address: 8919 NEW FALLS RD

LEVITTOWN PA 19054

Phone/Email: 2155471221 JORDAN@JORDANROSENINSURANCE.COM

# Agency Scorecard

**PA**

## 1365591, JILLIAN O`BRIEN INSURANCE & FINANCIAL SERVICES LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 999.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **999.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $20,633 | -16.2% | 10.1% | $18,823 | -15.3% | $2,318 | -25.6% | 17 | 6.3% | 77.3% | $1,214 | 10/31/2025 |
| | Home | $5,958 | -44.3% | 12.3% | $5,958 | 26.1% | $0 | -100.0% | 3 | 0.0% | 100.0% | $1,986 | 10/31/2025 |
| | Mobile Home | $8,067 | -3.3% | 18.3% | $7,449 | 7.8% | $0 | 0.0% | 12 | 0.0% | 92.3% | $672 | 10/31/2025 |
| | Motorcycle | $75 | 0.0% | 2.6% | $75 | 0.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $75 | 10/31/2025 |
| | Off-Road Veh | $1,011 | 6.6% | 294.4% | $1,011 | 6.6% | $0 | 0.0% | 5 | -16.7% | 83.3% | $202 | 10/31/2025 |
| | Rental M.H. | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$35,744** | **-20.0%** | **19.2%** | **$33,316** | **-4.4%** | **$2,318** | **-50.2%** | **38** | **0.0%** | **84.4%** | **$941** | |
| **Total** | **Total** | **$35,744** | **-20.0%** | **19.2%** | **$33,316** | **-4.4%** | **$2,318** | **-50.2%** | **38** | **0.0%** | **84.4%** | **$941** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 148 | 0 | $0 | 129 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **148** | **0** | **$0** | **129** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 45 | 6 | $10,920 | 38 | 6 | $10,920 | 0.16 | 4 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 5 | 0 | $0 | 5 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 8 | 1 | $1,006 | 7 | 1 | $1,006 | 0.14 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **58** | **7** | **$11,926** | **50** | **7** | **11,926** | **0.14** | **6** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **206** | **7** | **$11,926** | **179** | **7** | **11,926** | **0.04** | **6** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Keith Long

Role: LBE

LBE UPN:1365591

JILLIAN O`BRIEN INSURANCE & FINANCIAL SERVICES LLC

Address: 230 W MARKET ST

WEST CHESTER PA 19382

Phone/Email: 6106965130 JILLIAN@OBRIEN-INSURANCE.COM

# Agency Scorecard

**PA**

## 1376756, WENHOLD INSURANCE AGENCY LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $667 | -112.9% | 19.8% | $2,977 | -153.3% | $0 | 0.0% | 2 | -33.3% | 50.0% | $334 | 10/31/2025 |
| | Home | $1,247 | 7.0% | 13.6% | $1,247 | 7.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,247 | 10/31/2025 |
| | Mobile Home | $35,832 | 14.7% | 61.5% | $32,402 | 10.9% | $1,005 | -36.1% | 47 | -4.1% | 88.7% | $762 | 10/31/2025 |
| | Motorcycle | $578 | 0.3% | 3.4% | $0 | -100.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $578 | 10/31/2025 |
| | Rental M.H. | $3,026 | 1.7% | 18.2% | $0 | -100.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $3,026 | 10/31/2025 |
| | Travel Trailer | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$41,350** | **34.4%** | **53.6%** | **$36,626** | **48.6%** | **$1,005** | **-36.1%** | **52** | **-5.5%** | **86.7%** | **$795** | |
| **Total** | **Total** | **$41,350** | **34.4%** | **53.6%** | **$36,626** | **48.6%** | **$1,005** | **-36.1%** | **52** | **-5.5%** | **86.7%** | **$795** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 5 | 1 | $3,428 | 3 | 1 | $3,428 | 0.33 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 9 | 4 | $3,231 | 7 | 4 | $3,231 | 0.57 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **16** | **5** | **$6,659** | **12** | **5** | **6,659** | **0.42** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **16** | **5** | **$6,659** | **12** | **5** | **6,659** | **0.42** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Keith Long

Role: LBE

LBE UPN:1376756

WENHOLD INSURANCE AGENCY LLC

Address: 411 HARLEYSVILLE PIKE

SOUDERTON PA 18964

Phone/Email: 2157232195 WENDY@WENHOLDINSURANCE.COM

RI

# Agency Scorecard

## 1278117, HORTON,ANN

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $7,994 | 25.2% | 21.6% | $4,481 | 48.1% | $0 | 0.0% | 2 | 0.0% | 100.0% | $3,997 | 10/31/2025 |
| | Home | $6,850 | 34.0% | 516.0% | $6,850 | 34.0% | $0 | 0.0% | 2 | 0.0% | 100.0% | $3,425 | 10/31/2025 |
| | Mobile Home | $8,463 | 26.3% | 65.7% | $6,420 | 22.6% | $0 | 0.0% | 6 | 0.0% | 100.0% | $1,411 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Travel Trailer | $0 | -100.0% | -150.9% | $0 | -100.0% | $0 | -100.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$23,307** | **27.2%** | **174.1%** | **$17,751** | **31.6%** | **$0** | **-100.0%** | **10** | **0.0%** | **100.0%** | **$2,331** | |
| **Total** | **Total** | **$23,307** | **27.2%** | **174.1%** | **$17,751** | **31.6%** | **$0** | **-100.0%** | **10** | **0.0%** | **100.0%** | **$2,331** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | 2 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **3** | **0** | **$0** | **2** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **3** | **0** | **$0** | **2** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1278117

HORTON,ANN

Address: 57 GOLD MINE RD

CHEPACHET RI 02814

Phone/Email: 4013494116 ANN@HORTONAGENCYRI.COM

RI

# Agency Scorecard

## 1287197, ZELANO INSURANCE AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $65,958 | 23.9% | 28.1% | $37,291 | -19.4% | $1,899 | -56.2% | 22 | -15.4% | 66.7% | $2,998 | 10/31/2025 |
| | Home | $9,257 | -23.3% | 16.9% | $9,257 | -23.3% | $2,946 | 5.0% | 3 | -25.0% | 75.0% | $3,086 | 10/31/2025 |
| | Marine | $2,264 | 32.7% | 1793.6% | $2,264 | 32.7% | $460 | 0.0% | 5 | 25.0% | 83.3% | $453 | 10/31/2025 |
| | Mobile Home | $9,343 | 20.2% | 29.2% | $9,343 | 20.2% | $0 | 0.0% | 7 | 0.0% | 100.0% | $1,335 | 10/31/2025 |
| | Motorcycle | $5,274 | 8.1% | 639.7% | $3,430 | -16.4% | $0 | -100.0% | 6 | 0.0% | 66.7% | $879 | 10/31/2025 |
| | Off-Road Veh | $546 | -11.9% | 3.2% | $546 | -11.9% | $0 | 0.0% | 1 | 0.0% | 100.0% | $546 | 10/31/2025 |
| | Travel Trailer | $292 | -6.7% | 1.6% | $292 | -6.7% | $0 | 0.0% | 1 | 0.0% | 100.0% | $292 | 10/31/2025 |
| | **Total** | **$92,934** | **15.3%** | **102.8%** | **$62,423** | **-14.3%** | **$5,305** | **-33.6%** | **45** | **-8.2%** | **73.8%** | **$2,065** | |
| **Total** | **Total** | **$92,934** | **15.3%** | **102.8%** | **$62,423** | **-14.3%** | **$5,305** | **-33.6%** | **45** | **-8.2%** | **73.8%** | **$2,065** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 29 | 7 | $22,384 | 22 | 5 | $14,419 | 0.23 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 5 | 0 | $0 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 2 | 2 | $1,074 | 2 | 2 | $1,074 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 8 | 3 | $2,134 | 7 | 2 | $1,046 | 0.29 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **46** | **12** | **$25,592** | **36** | **9** | **16,539** | **0.25** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **46** | **12** | **$25,592** | **36** | **9** | **16,539** | **0.25** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Casey Knapp

Role: LBE

LBE UPN:1287197

ZELANO INSURANCE AGENCY INC

Address: 37 PLEASANT VIEW AVE

GREENVILLE RI 02828

Phone/Email: 4019491550 ROBK@ZELANOINSURANCE.COM

RI

# Agency Scorecard

## 1332814, B MCLANE INSURANCE AGENCY, INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $16,466 | -35.8% | 21.3% | $16,466 | -32.1% | $0 | 0.0% | 9 | -25.0% | 75.0% | $1,830 | 10/31/2025 |
| | Marine | $210 | 0.0% | 17.4% | $210 | 0.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $210 | 10/31/2025 |
| | Mobile Home | $3,555 | -14.8% | 35.1% | $3,555 | -14.8% | $0 | 0.0% | 4 | -20.0% | 80.0% | $889 | 10/31/2025 |
| | Off-Road Veh | $75 | 0.0% | 3.0% | $75 | 0.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $75 | 10/31/2025 |
| | Rental M.H. | $0 | -100.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Travel Trailer | ($425) | -136.4% | 4811.9% | ($425) | -136.4% | $0 | -100.0% | 1 | -50.0% | 50.0% | ($425) | 10/31/2025 |
| | **Total** | **$19,881** | **-36.1%** | **98.4%** | **$19,881** | **-33.4%** | **$0** | **-100.0%** | **16** | **-23.8%** | **76.2%** | **$1,243** | |
| **Total** | **Total** | **$19,881** | **-36.1%** | **98.4%** | **$19,881** | **-33.4%** | **$0** | **-100.0%** | **16** | **-23.8%** | **76.2%** | **$1,243** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | 15 | 0 | $0 | 13 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **18** | **0** | **$0** | **16** | **0** | **0** | **0.00** | **1** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **18** | **0** | **$0** | **16** | **0** | **0** | **0.00** | **1** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1332814

B MCLANE INSURANCE AGENCY, INC

Address: 994 WILLETT AVE

RIVERSIDE RI 02915

Phone/Email: 4014334100 BRAD@MCLANEINSURANCE.COM

SC

# Agency Scorecard

## 1280514, NIX INSURANCE AGENCY, LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $35,744 | 53.0% | 14.3% | $25,349 | 55.3% | $3,500 | 82.7% | 21 | 23.5% | 80.8% | $1,702 | 10/31/2025 |
| | Home | $23,851 | 365.1% | 16.7% | $22,739 | 462.3% | $3,390 | 105.6% | 16 | 300.0% | 100.0% | $1,491 | 10/31/2025 |
| | Mobile Home | $36,670 | -5.7% | 14.6% | $30,824 | -4.5% | $4,453 | -26.7% | 31 | -3.1% | 93.9% | $1,183 | 10/31/2025 |
| | Motor Home | $1,085 | 9.0% | 18.1% | $1,085 | 9.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,085 | 10/31/2025 |
| | Motorcycle | ($361) | -113.0% | 56.7% | $318 | -88.6% | $0 | 0.0% | 2 | -33.3% | 50.0% | ($181) | 10/31/2025 |
| | Off-Road Veh | $282 | 2.2% | 1.2% | $282 | 2.2% | $0 | 0.0% | 2 | 0.0% | 100.0% | $141 | 10/31/2025 |
| | Rental M.H. | $843 | 18.9% | 2.4% | $943 | 33.0% | $800 | -217.6% | 1 | -50.0% | 33.3% | $843 | 10/31/2025 |
| | Travel Trailer | $1,352 | -29.9% | 9.8% | $1,121 | 12.9% | $662 | -6.2% | 3 | 0.0% | 100.0% | $451 | 10/31/2025 |
| | **Total** | **$99,466** | **34.3%** | **15.1%** | **$82,661** | **41.6%** | **$12,805** | **32.5%** | **77** | **20.3%** | **87.5%** | **$1,292** | |
| **Total** | **Total** | **$99,466** | **34.3%** | **15.1%** | **$82,661** | **41.6%** | **$12,805** | **32.5%** | **77** | **20.3%** | **87.5%** | **$1,292** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 27 | 9 | $11,704 | 23 | 7 | $8,749 | 0.30 | 3 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 35 | 12 | $17,024 | 32 | 12 | $17,024 | 0.38 | 4 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 3 | 1 | $635 | 3 | 1 | $635 | 0.33 | 1 | 1 | $635 | 100.0% | 10/31/2025 |
| | Motor Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 2 | 1 | $80 | 2 | 1 | $80 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 3 | 1 | $800 | 3 | 1 | $800 | 0.33 | 1 | 1 | $800 | 100.0% | 10/31/2025 |
| | Travel Trailer | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **71** | **24** | **$30,243** | **64** | **22** | **27,288** | **0.34** | **9** | **2** | **$1,435** | **22.2%** | |
| **Grand Total** | | **71** | **24** | **$30,243** | **64** | **22** | **27,288** | **0.34** | **9** | **2** | **$1,435** | **22.2%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Chase Vandenberg

Role: LBE

LBE UPN:1280514

NIX INSURANCE AGENCY, LLC

Address: 102 N EARLE ST

WALHALLA SC 29691

Phone/Email: 8646385844 NIXAGENCYLLC@GMAIL.COM

SC

# Agency Scorecard

## 1281031, AYDLETTE SERVICES OF THE LOWCOUNTRY, INC.

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $1,506 | -78.7% | 24.7% | ($1,290) | -122.2% | $0 | 0.0% | 1 | -66.7% | 33.3% | $1,506 | 10/31/2025 |
| | Home | $7,518 | 5.5% | 26.9% | $7,518 | 5.5% | $2,553 | 5.8% | 3 | 0.0% | 100.0% | $2,506 | 10/31/2025 |
| | Marine | $7,560 | -7.2% | 445.8% | $7,128 | -11.3% | ($761) | -2817.9% | 12 | -7.7% | 85.7% | $630 | 10/31/2025 |
| | Mobile Home | $22,954 | -17.2% | 26.6% | $19,084 | -20.9% | $2,815 | -54.9% | 13 | -7.1% | 81.3% | $1,766 | 10/31/2025 |
| | Motor Home | $5,309 | 4.7% | 16.8% | $3,705 | 7.3% | $3,705 | 7.3% | 2 | 0.0% | 100.0% | $2,655 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Off-Road Veh | $1,708 | -12.3% | 4.0% | $1,708 | -3.4% | $306 | -14.0% | 7 | 0.0% | 100.0% | $244 | 10/31/2025 |
| | Rental M.H. | $154 | -98.1% | 24.3% | ($141) | -101.8% | $0 | -100.0% | 4 | -20.0% | 80.0% | $39 | 10/31/2025 |
| | Travel Trailer | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$46,709** | **-28.6%** | **81.8%** | **$37,712** | **-35.4%** | **$8,618** | **-43.9%** | **42** | **-10.6%** | **84.0%** | **$1,112** | |
| **Total** | **Total** | **$46,709** | **-28.6%** | **81.8%** | **$37,712** | **-35.4%** | **$8,618** | **-43.9%** | **42** | **-10.6%** | **84.0%** | **$1,112** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 2 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **2** | **0** | **$0** | **1** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 9 | 0 | $0 | 9 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 4 | 0 | $0 | 4 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 2 | 1 | $918 | 2 | 1 | $918 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 7 | 2 | $2,659 | 7 | 2 | $2,659 | 0.29 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 3 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 1 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **27** | **3** | **$3,577** | **23** | **3** | **3,577** | **0.13** | **2** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **29** | **3** | **$3,577** | **24** | **3** | **3,577** | **0.13** | **2** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Chase Vandenberg

Role: LBE

LBE UPN:1281031

AYDLETTE SERVICES OF THE LOWCOUNTRY, INC.

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BEAUFORT SC 29907

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SC

# Agency Scorecard

## 1293978, DAVID T CHUDYK AGENCY, LLC THE

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $2,834 | 0.6% | 0.9% | $2,834 | 0.6% | $0 | 0.0% | 1 | 0.0% | 100.0% | $2,834 | 10/31/2025 |
| | **Total** | **$2,834** | **0.6%** | **0.9%** | **$2,834** | **0.6%** | **$0** | **0.0%** | **1** | **0.0%** | **100.0%** | **$2,834** | |
| Foremost Choice | Dwelling Fire | $57,799 | 93.4% | 22.2% | $52,588 | 104.6% | $2,786 | 81.6% | 32 | 52.4% | 86.5% | $1,806 | 10/31/2025 |
| | Home | $12,300 | 17.8% | 15.2% | $7,388 | -29.3% | $0 | -100.0% | 5 | 0.0% | 83.3% | $2,460 | 10/31/2025 |
| | Marine | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $29,692 | 17.8% | 16.0% | $26,359 | 7.6% | $1,503 | 1.6% | 22 | 10.0% | 100.0% | $1,350 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $5,705 | -43.8% | 15.1% | $3,018 | -65.3% | $1,968 | -45.8% | 3 | -25.0% | 75.0% | $1,902 | 10/31/2025 |
| | Travel Trailer | $1,019 | 134.8% | 9.8% | $594 | 9999.9% | $594 | 9999.9% | 2 | 100.0% | 100.0% | $510 | 10/31/2025 |
| | **Total** | **$106,515** | **39.9%** | **18.4%** | **$89,947** | **29.7%** | **$6,851** | **-20.8%** | **64** | **25.5%** | **90.1%** | **$1,664** | |
| **Total** | **Total** | **$109,349** | **38.5%** | **17.8%** | **$92,781** | **28.6%** | **$6,851** | **-20.8%** | **65** | **25.0%** | **90.3%** | **$1,682** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 31 | 16 | $35,484 | 29 | 14 | $32,759 | 0.48 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 20 | 1 | $1,644 | 16 | 0 | $0 | 0.00 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 4 | 2 | $2,355 | 4 | 2 | $2,355 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 1 | 1 | $594 | 1 | 1 | $594 | 1.00 | 1 | 1 | $594 | 100.0% | 10/31/2025 |
| | **Total** | **58** | **20** | **$40,077** | **51** | **17** | **35,708** | **0.33** | **6** | **1** | **$594** | **16.7%** | |
| **Grand Total** | | **58** | **20** | **$40,077** | **51** | **17** | **35,708** | **0.33** | **6** | **1** | **$594** | **16.7%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1293978

DAVID T CHUDYK AGENCY, LLC THE

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SENECA SC 29678

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SC

# Agency Scorecard

## 1324784, CINDY EVANS INSURANCE & FINANCIAL SERVICES LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | ($1,888) | -111.7% | 824.7% | $6,393 | -60.4% | $0 | -100.0% | 1 | 0.0% | 25.0% | ($1,888) | 10/31/2025 |
| | **Total** | **($1,888)** | **-111.7%** | **824.7%** | **$6,393** | **-60.4%** | **$0** | **-100.0%** | **1** | **0.0%** | **25.0%** | **($1,888)** | |
| Foremost Choice | Dwelling Fire | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Home | $4,913 | 50.0% | 79.6% | $4,913 | 9.7% | $0 | 0.0% | 3 | 0.0% | 100.0% | $1,638 | 10/31/2025 |
| | Mobile Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$4,913** | **50.0%** | **79.6%** | **$4,913** | **9.7%** | **$0** | **0.0%** | **3** | **0.0%** | **100.0%** | **$1,638** | |
| **Total** | **Total** | **$3,025** | **-84.4%** | **496.3%** | **$11,306** | **-45.2%** | **$0** | **-100.0%** | **4** | **0.0%** | **57.1%** | **$756** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 6 | 3 | $15,281 | 4 | 2 | $4,335 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **6** | **3** | **$15,281** | **4** | **2** | **4,335** | **0.50** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **6** | **3** | **$15,281** | **4** | **2** | **4,335** | **0.50** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Chase Vandenberg

Role: LBE

LBE UPN:1324784

CINDY EVANS INSURANCE & FINANCIAL SERVICES LLC

Address: 1705B CAROLINA AVE

ORANGEBURG SC 29115

Phone/Email: 8038305700 SALES@CINDYEVANS.NET

SC

# Agency Scorecard

## 1439153, GRIFFIN INSURANCE AGENCY LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $17,583 | 133.2% | 0.9% | $10,221 | 35.6% | $0 | -100.0% | 1 | -50.0% | 16.7% | $17,583 | 10/31/2025 |
| | **Total** | **$17,583** | **133.2%** | **0.9%** | **$10,221** | **35.6%** | **$0** | **-100.0%** | **1** | **-50.0%** | **16.7%** | **$17,583** | |
| Foremost Choice | Dwelling Fire | $68,727 | 76.4% | 27.6% | $63,430 | 76.0% | $6,876 | 9999.9% | 45 | 50.0% | 97.8% | $1,527 | 10/31/2025 |
| | Home | $56,635 | 94.1% | 22.9% | $48,919 | 84.2% | $10,329 | 159.3% | 34 | 142.9% | 91.9% | $1,666 | 10/31/2025 |
| | Marine | ($156) | -175.4% | -7.8% | $0 | -100.0% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $24,067 | 945.0% | 25.7% | $22,511 | 5792.9% | $5,796 | 9999.9% | 12 | 1100.0% | 80.0% | $2,006 | 10/31/2025 |
| | Motor Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $1,083 | 9999.9% | 12.4% | $1,083 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $1,083 | 10/31/2025 |
| | Off-Road Veh | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $1,094 | 2.5% | 21.0% | $1,094 | 2.5% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,094 | 10/31/2025 |
| | Travel Trailer | $732 | -33.1% | 10.9% | $732 | 9.3% | $416 | -1.4% | 3 | 0.0% | 75.0% | $244 | 10/31/2025 |
| | **Total** | **$152,182** | **109.0%** | **25.5%** | **$137,769** | **112.2%** | **$23,417** | **431.5%** | **96** | **92.0%** | **91.4%** | **$1,585** | |
| **Total** | **Total** | **$169,765** | **111.2%** | **21.1%** | **$147,990** | **104.2%** | **$23,417** | **447.4%** | **97** | **86.5%** | **87.4%** | **$1,750** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 721 | 4 | $14,337 | 594 | 2 | $9,586 | 0.00 | 59 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **721** | **4** | **$14,337** | **594** | **2** | **9,586** | **0.00** | **59** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 193 | 16 | $25,066 | 172 | 16 | $25,066 | 0.09 | 17 | 1 | $1,718 | 5.9% | 10/31/2025 |
| | Home | 296 | 23 | $32,434 | 270 | 22 | $31,008 | 0.08 | 17 | 5 | $7,374 | 29.4% | 10/31/2025 |
| | Marine | 5 | 0 | $0 | 5 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 78 | 14 | $26,801 | 72 | 13 | $25,245 | 0.18 | 6 | 2 | $3,713 | 33.3% | 10/31/2025 |
| | Motor Home | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 10 | 1 | $1,083 | 10 | 1 | $1,083 | 0.10 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 6 | 0 | $0 | 6 | 0 | $0 | 0.00 | 3 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 9 | 1 | $123 | 9 | 1 | $123 | 0.11 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **601** | **55** | **$85,507** | **548** | **53** | **82,525** | **0.10** | **43** | **8** | **$12,805** | **18.6%** | |
| **Grand Total** | | **1,322** | **59** | **$99,844** | **1,142** | **55** | **92,111** | **0.05** | **102** | **8** | **$12,805** | **7.8%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Michael McGinty

Role: LBE

LBE UPN:1439153

GRIFFIN INSURANCE AGENCY LLC

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SUMTER SC 29150

Phone/Email: 8038480089 JOSH@GRIFFININS.NET

SC

# Agency Scorecard

## 1456023, INSURANCE COMPANY ADVISORS GROUP

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $7,385 | -28.2% | 41.1% | $7,615 | 15.1% | $1,774 | -2.4% | 7 | 40.0% | 70.0% | $1,055 | 10/31/2025 |
| | Home | $7,379 | 89.3% | 26.4% | $6,097 | 99.1% | $0 | 0.0% | 8 | 33.3% | 88.9% | $922 | 10/31/2025 |
| | Marine | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $4,674 | 15.4% | 28.3% | $4,674 | 15.4% | $0 | 0.0% | 3 | 50.0% | 75.0% | $1,558 | 10/31/2025 |
| | Motor Home | $0 | -100.0% | 14.2% | $0 | -100.0% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $0 | -100.0% | -20.8% | ($411) | 0.0% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $6,876 | -24.8% | 21.9% | $6,876 | -24.8% | ($737) | 0.0% | 7 | -36.4% | 58.3% | $982 | 10/31/2025 |
| | **Total** | **$26,314** | **-8.5%** | **28.1%** | **$24,851** | **4.2%** | **$1,037** | **-42.9%** | **25** | **-3.8%** | **67.6%** | **$1,053** | |
| **Total** | **Total** | **$26,314** | **-8.5%** | **28.1%** | **$24,851** | **4.2%** | **$1,037** | **-42.9%** | **25** | **-3.8%** | **67.6%** | **$1,053** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | 28 | 5 | $5,897 | 23 | 5 | $5,897 | 0.22 | 1 | 1 | $1,774 | 100.0% | 10/31/2025 |
| | Home | 8 | 3 | $2,756 | 7 | 2 | $1,884 | 0.29 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 9 | 2 | $3,368 | 9 | 2 | $3,368 | 0.22 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 3 | 1 | $1,443 | 3 | 1 | $1,443 | 0.33 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **48** | **11** | **$13,464** | **42** | **10** | **12,592** | **0.24** | **1** | **1** | **$1,774** | **100.0%** | |
| **Grand Total** | | **48** | **11** | **$13,464** | **42** | **10** | **12,592** | **0.24** | **1** | **1** | **$1,774** | **100.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1456023

INSURANCE COMPANY ADVISORS GROUP

Address: 1122 LADY ST OFC 308

COLUMBIA SC 29201

Phone/Email: 8432126221 CLAY@MYICAGROUP.COM

SC

# Agency Scorecard

## 1528104, THE RUSHTON AGENCY, LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $38,512 | 14.0% | 13.3% | $22,835 | -9.0% | $8,624 | 187.9% | 34 | 0.0% | 82.9% | $1,133 | 10/31/2025 |
| | Home | $6,606 | 96.0% | 17.4% | $6,606 | 96.0% | $2,279 | 9999.9% | 3 | 50.0% | 75.0% | $2,202 | 10/31/2025 |
| | Marine | $309 | 3.7% | 16.4% | $309 | 3.7% | $0 | 0.0% | 1 | 0.0% | 100.0% | $309 | 10/31/2025 |
| | Mobile Home | $35,024 | 16.1% | 14.8% | $31,941 | 35.7% | $1,141 | -55.3% | 32 | 10.3% | 91.4% | $1,095 | 10/31/2025 |
| | Motorcycle | $1,120 | 24.4% | 3.9% | $1,120 | 0.3% | $0 | 0.0% | 3 | 0.0% | 100.0% | $373 | 10/31/2025 |
| | Off-Road Veh | ($56) | -112.4% | -28.5% | ($56) | -112.4% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $7,613 | 1.4% | 14.7% | $6,943 | 0.9% | $302 | 2.7% | 15 | 0.0% | 100.0% | $508 | 10/31/2025 |
| | Travel Trailer | $1,677 | 11.6% | 10.2% | $1,677 | 11.6% | $0 | 0.0% | 4 | 33.3% | 100.0% | $419 | 10/31/2025 |
| | **Total** | **$90,805** | **16.5%** | **14.0%** | **$71,375** | **14.7%** | **$12,346** | **111.3%** | **92** | **4.5%** | **88.5%** | **$987** | |
| **Total** | **Total** | **$90,805** | **16.5%** | **14.0%** | **$71,375** | **14.7%** | **$12,346** | **111.3%** | **92** | **4.5%** | **88.5%** | **$987** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 25 | 7 | $8,435 | 19 | 7 | $8,435 | 0.37 | 5 | 5 | $6,307 | 100.0% | 10/31/2025 |
| | Home | 6 | 2 | $3,104 | 5 | 2 | $3,104 | 0.40 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 11 | 6 | $7,998 | 10 | 5 | $6,741 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 1 | 1 | $232 | 1 | 1 | $232 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **44** | **16** | **$19,769** | **36** | **15** | **18,512** | **0.42** | **5** | **5** | **$6,307** | **100.0%** | |
| **Grand Total** | | **44** | **16** | **$19,769** | **36** | **15** | **18,512** | **0.42** | **5** | **5** | **$6,307** | **100.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Chase Vandenberg

Role: LBE

LBE UPN:1528104

THE RUSHTON AGENCY, LLC

Address: 106 BRADLEY AVE

EASLEY SC 29640

Phone/Email: 8648599953 JAN@RUSHTONINS.COM

# Agency Scorecard

**TN**

## 1280712, BASS,MICHELLE

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $5,129 | -9.5% | 19.1% | $5,129 | -9.5% | ($142) | -123.7% | 4 | -20.0% | 80.0% | $1,282 | 10/31/2025 |
| | Home | $2,474 | -16.2% | 15.7% | $2,474 | 35.7% | $0 | 0.0% | 2 | 0.0% | 100.0% | $1,237 | 10/31/2025 |
| | Mobile Home | $5,192 | -22.9% | 16.2% | $4,684 | -30.4% | ($175) | 0.0% | 4 | -33.3% | 66.7% | $1,298 | 10/31/2025 |
| | Motorcycle | $221 | 9999.9% | 10.6% | $221 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $221 | 10/31/2025 |
| | Off-Road Veh | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $507 | 62.5% | 9.5% | $507 | 62.5% | $0 | 0.0% | 1 | 0.0% | 100.0% | $507 | 10/31/2025 |
| | Travel Trailer | $3,688 | -0.6% | 17.2% | $2,996 | -0.1% | $0 | -100.0% | 5 | 0.0% | 100.0% | $738 | 10/31/2025 |
| | **Total** | **$17,211** | **-11.1%** | **17.0%** | **$16,011** | **-8.6%** | **($317)** | **-114.5%** | **17** | **-10.5%** | **85.0%** | **$1,012** | |
| **Total** | **Total** | **$17,211** | **-11.1%** | **17.0%** | **$16,011** | **-8.6%** | **($317)** | **-114.5%** | **17** | **-10.5%** | **85.0%** | **$1,012** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 4 | 0 | $0 | 4 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **4** | **0** | **$0** | **4** | **0** | **0** | **0.00** | **1** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 13 | 0 | $0 | 12 | 0 | $0 | 0.00 | 5 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 1 | 1 | $221 | 1 | 1 | $221 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 2 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **18** | **1** | **$221** | **16** | **1** | **221** | **0.06** | **5** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **22** | **1** | **$221** | **20** | **1** | **221** | **0.05** | **6** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Brittany Speer

Role: LBE

LBE UPN:1280712

BASS,MICHELLE

Address: 902 SUNSET DR STE 5A

JOHNSON CITY TN 37604

Phone/Email: 4239291666 INFO@BASSGROUPINS.COM

# Agency Scorecard

**TN**

## 1288226, NEWMAN,JOSEPH DAVID

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $16,254 | 1123.9% | 20.7% | $13,644 | 927.4% | $4,411 | 9999.9% | 5 | 400.0% | 100.0% | $3,251 | 10/31/2025 |
| | Home | $1,582 | -36.7% | 834.9% | $1,582 | -36.7% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,582 | 10/31/2025 |
| | Marine | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $18,932 | 33.4% | 17.3% | $16,663 | 17.4% | $2,741 | 9999.9% | 10 | 11.1% | 100.0% | $1,893 | 10/31/2025 |
| | Rental M.H. | $2,505 | -60.7% | 10.7% | $2,737 | -57.1% | $0 | -100.0% | 3 | 0.0% | 75.0% | $835 | 10/31/2025 |
| | Travel Trailer | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$39,273** | **61.0%** | **79.8%** | **$34,626** | **41.9%** | **$7,152** | **-4258.1%** | **19** | **35.7%** | **95.0%** | **$2,067** | |
| **Total** | **Total** | **$39,273** | **61.0%** | **79.8%** | **$34,626** | **41.9%** | **$7,152** | **-4258.1%** | **19** | **35.7%** | **95.0%** | **$2,067** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 25 | 4 | $12,219 | 23 | 3 | $9,609 | 0.13 | 5 | 1 | $1,733 | 20.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 7 | 1 | $2,269 | 2 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 3 | 1 | $2,468 | 1 | 1 | $2,468 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **37** | **6** | **$16,956** | **28** | **4** | **12,077** | **0.14** | **7** | **1** | **$1,733** | **14.3%** | |
| **Grand Total** | | **37** | **6** | **$16,956** | **28** | **4** | **12,077** | **0.14** | **7** | **1** | **$1,733** | **14.3%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Brittany Speer

Role: LBE

LBE UPN:1288226

NEWMAN,JOSEPH DAVID

Address: 1048 S WATER AVE

GALLATIN TN 37066

Phone/Email: 6154527439 JOE@NEWMANAGENCY.NET

TN

# Agency Scorecard

## 1360080, SUEING,CHARLES ALBERT

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $197,448 | 7.3% | 35.3% | $197,686 | 11.9% | ($9,393) | 0.0% | 15 | 15.4% | 78.9% | $13,163 | 10/31/2025 |
| | Home | $6,245 | -2.5% | 15.2% | $2,810 | -25.7% | $0 | 0.0% | 2 | 0.0% | 100.0% | $3,123 | 10/31/2025 |
| | **Total** | **$203,693** | **6.9%** | **34.7%** | **$200,496** | **11.1%** | **($9,393)** | **0.0%** | **17** | **13.3%** | **81.0%** | **$11,982** | |
| **Total** | **Total** | **$203,693** | **6.9%** | **34.7%** | **$200,496** | **11.1%** | **($9,393)** | **0.0%** | **17** | **13.3%** | **81.0%** | **$11,982** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 17 | 6 | $23,338 | 14 | 5 | $20,212 | 0.36 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **17** | **6** | **$23,338** | **14** | **5** | **20,212** | **0.36** | **1** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **17** | **6** | **$23,338** | **14** | **5** | **20,212** | **0.36** | **1** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Brittany Speer

Role: LBE

LBE UPN:1360080

SUEING,CHARLES ALBERT

Address: 201 THOMPSON LN STE 105

NASHVILLE TN 37211

Phone/Email: 6153660523 CHARLES@SUEINGINSURANCEAGENCY.COM

# Agency Scorecard

**TN**

## 1360332, CARPENTER,PATRICK H

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $9,917 | 35.9% | 16.7% | $8,973 | 23.0% | $0 | 0.0% | 5 | 25.0% | 83.3% | $1,983 | 10/31/2025 |
| | Home | $2,492 | -22.0% | 15.6% | $0 | -100.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $2,492 | 10/31/2025 |
| | Marine | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $8,191 | 25.2% | 16.7% | $6,545 | 27.7% | $3,911 | 2.3% | 4 | 33.3% | 100.0% | $2,048 | 10/31/2025 |
| | Motorcycle | ($710) | -182.4% | -102.5% | $0 | -100.0% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Off-Road Veh | $299 | -2.9% | -2.6% | $299 | -2.9% | $0 | 0.0% | 1 | 0.0% | 100.0% | $299 | 10/31/2025 |
| | Rental M.H. | $1,984 | -12.7% | 15.8% | $1,515 | -17.8% | $0 | 0.0% | 1 | -50.0% | 50.0% | $1,984 | 10/31/2025 |
| | Travel Trailer | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$22,173** | **7.1%** | **15.9%** | **$17,332** | **9.7%** | **$3,911** | **2.3%** | **12** | **0.0%** | **80.0%** | **$1,848** | |
| **Total** | **Total** | **$22,173** | **7.1%** | **15.9%** | **$17,332** | **9.7%** | **$3,911** | **2.3%** | **12** | **0.0%** | **80.0%** | **$1,848** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 110 | 0 | $0 | 108 | 0 | $0 | 0.00 | 11 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **110** | **0** | **$0** | **108** | **0** | **0** | **0.00** | **11** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 24 | 2 | $3,608 | 24 | 2 | $3,608 | 0.08 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 3 | 1 | $951 | 2 | 1 | $951 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **31** | **3** | **$4,559** | **30** | **3** | **4,559** | **0.10** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **141** | **3** | **$4,559** | **138** | **3** | **4,559** | **0.02** | **11** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Brian Cheetham

Role: LBE

LBE UPN:1360332

CARPENTER,PATRICK H

Address: 567 CASON LN STE F

MURFREESBORO TN 37128

Phone/Email: 6158968484 PATRICK@MYCBCAGENT.COM

TN

# Agency Scorecard

## 1360339, CARPENTER,PATRICK H

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $7,976 | 132.1% | 20.7% | $6,469 | 0.5% | $457 | -35.0% | 8 | -11.1% | 72.7% | $997 | 10/31/2025 |
| | Mobile Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $129 | -192.8% | 19.4% | $129 | -192.8% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$8,105** | **145.8%** | **20.7%** | **$6,598** | **4.7%** | **$457** | **-35.0%** | **8** | **-11.1%** | **66.7%** | **$1,013** | |
| **Total** | **Total** | **$8,105** | **145.8%** | **20.7%** | **$6,598** | **4.7%** | **$457** | **-35.0%** | **8** | **-11.1%** | **66.7%** | **$1,013** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **1** | **0** | **$0** | **1** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 9 | 2 | $2,339 | 6 | 1 | $794 | 0.17 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 1 | $1,021 | 1 | 1 | $1,021 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **10** | **3** | **$3,360** | **7** | **2** | **1,815** | **0.29** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **11** | **3** | **$3,360** | **8** | **2** | **1,815** | **0.25** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Brittany Speer

Role: SUB

LBE UPN:1360332

1360332

CARPENTER,PATRICK H

Address: 901 N CHANCERY ST STE 2

MCMINNVILLE TN 37110

Phone/Email: 9314733344 PATRICK@MYCBCAGENT.COM

TN

# Agency Scorecard

## 1360341, CARPENTER,PATRICK H

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $11,520 | 9999.9% | 21.7% | $5,859 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $11,520 | 10/31/2025 |
| | Marine | $353 | 1.1% | 5.6% | $353 | 1.1% | $0 | 0.0% | 1 | 0.0% | 100.0% | $353 | 10/31/2025 |
| | Mobile Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$11,873** | **3302.0%** | **20.6%** | **$6,212** | **1679.9%** | **$0** | **0.0%** | **2** | **100.0%** | **100.0%** | **$5,937** | |
| **Total** | **Total** | **$11,873** | **3302.0%** | **20.6%** | **$6,212** | **1679.9%** | **$0** | **0.0%** | **2** | **100.0%** | **100.0%** | **$5,937** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 3 | 1 | $5,661 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 1 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **4** | **1** | **$5,661** | **1** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **4** | **1** | **$5,661** | **1** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Brian Cheetham

Role: SUB

LBE UPN:1360332

1360332

CARPENTER,PATRICK H

Address: PO BOX 1317

SPRING HILL TN 37174

Phone/Email: 6153023456 PATRICK@MYCBCAGENT.COM

# Agency Scorecard

**TN**

## 1375939, CHURCHILL AGENCY VENTURES, LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $4,112 | 63.8% | 12.2% | $4,112 | 63.8% | $0 | -100.0% | 1 | 0.0% | 100.0% | $4,112 | 10/31/2025 |
| | Home | $4,894 | -13.5% | 11.4% | $4,894 | 22.4% | $0 | 0.0% | 3 | 0.0% | 100.0% | $1,631 | 10/31/2025 |
| | Marine | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $18,456 | 27.7% | 13.1% | $15,738 | 20.0% | ($5) | -100.3% | 8 | 0.0% | 61.5% | $2,307 | 10/31/2025 |
| | Rental M.H. | $1,726 | 9999.9% | 148.6% | $1,726 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $1,726 | 10/31/2025 |
| | **Total** | **$29,188** | **29.0%** | **13.9%** | **$26,470** | **34.9%** | **($5)** | **-100.1%** | **13** | **8.3%** | **72.2%** | **$2,245** | |
| **Total** | **Total** | **$29,188** | **29.0%** | **13.9%** | **$26,470** | **34.9%** | **($5)** | **-100.1%** | **13** | **8.3%** | **72.2%** | **$2,245** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 18 | 5 | $10,659 | 17 | 4 | $9,191 | 0.24 | 2 | 1 | $3,405 | 50.0% | 10/31/2025 |
| | Rental M.H. | 1 | 1 | $1,726 | 1 | 1 | $1,726 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **23** | **6** | **$12,385** | **22** | **5** | **10,917** | **0.23** | **2** | **1** | **$3,405** | **50.0%** | |
| **Grand Total** | | **23** | **6** | **$12,385** | **22** | **5** | **10,917** | **0.23** | **2** | **1** | **$3,405** | **50.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Brian Cheetham

Role: LBE

LBE UPN:1375939

CHURCHILL AGENCY VENTURES, LLC

Address: 1749 MALLORY LN STE 300

BRENTWOOD TN 37027

Phone/Email: 8555318777 ALAINA.HIXSON@THECHURCHILLAGENCY.COM

TN

# Agency Scorecard

## 1438813, HICKORY COVE INSURANCE GROUP LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $18,142 | -838.4% | 18.2% | $18,142 | -838.4% | $965 | 9999.9% | 7 | 9999.9% | 87.5% | $2,592 | 10/31/2025 |
| | Mobile Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $10,089 | 9999.9% | 1038.4% | $7,037 | 9999.9% | $0 | 0.0% | 3 | 9999.9% | 33.3% | $3,363 | 10/31/2025 |
| | **Total** | **$28,231** | **-1249.0%** | **617.8%** | **$25,179** | **-1124.8%** | **$965** | **9999.9%** | **10** | **9999.9%** | **58.8%** | **$2,823** | |
| **Total** | **Total** | **$28,231** | **-1249.0%** | **617.8%** | **$25,179** | **-1124.8%** | **$965** | **9999.9%** | **10** | **9999.9%** | **58.8%** | **$2,823** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | 24 | 8 | $19,017 | 24 | 8 | $19,017 | 0.33 | 6 | 1 | $1,840 | 16.7% | 10/31/2025 |
| | Mobile Home | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 12 | 9 | $9,095 | 4 | 3 | $6,043 | 0.75 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **38** | **17** | **$28,112** | **30** | **11** | **25,060** | **0.37** | **7** | **1** | **$1,840** | **14.3%** | |
| **Grand Total** | | **38** | **17** | **$28,112** | **30** | **11** | **25,060** | **0.37** | **7** | **1** | **$1,840** | **14.3%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Melanie Everett

Role: LBE

LBE UPN:1438813

HICKORY COVE INSURANCE GROUP LLC

Address: 6706 HARVEST RUN DR

HARRISON TN 37341

Phone/Email: 8774029882 ALEX@HICKORYCOVEIG.COM

# Agency Scorecard

**TX**

## 176317, BEAL & WINN INSURANCE AGENCY LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $3,355 | 29.8% | 0.9% | $1,535 | -40.6% | ($485) | 0.0% | 1 | -50.0% | 33.3% | $3,355 | 10/31/2025 |
| | **Total** | **$3,355** | **29.8%** | **0.9%** | **$1,535** | **-40.6%** | **($485)** | **0.0%** | **1** | **-50.0%** | **33.3%** | **$3,355** | |
| Foremost Choice | Dwelling Fire | $46,104 | 2557.3% | 32.5% | $38,664 | 2128.5% | $8,000 | 9999.9% | 23 | 1050.0% | 100.0% | $2,005 | 10/31/2025 |
| | Home | $44,564 | 182.1% | 32.1% | $41,304 | 161.4% | $9,377 | 9999.9% | 15 | 150.0% | 88.2% | $2,971 | 10/31/2025 |
| | Marine | $1,726 | 15.1% | 17.3% | $1,726 | 15.1% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,726 | 10/31/2025 |
| | Mobile Home | $10,768 | 31.5% | 35.3% | $10,768 | 31.5% | $1,263 | -49.4% | 9 | 50.0% | 100.0% | $1,196 | 10/31/2025 |
| | Motor Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $1,731 | -2.8% | 11.4% | $1,731 | -2.8% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,731 | 10/31/2025 |
| | Off-Road Veh | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Travel Trailer | $825 | -46.4% | 24.9% | $275 | -79.7% | $0 | 0.0% | 2 | -33.3% | 50.0% | $413 | 10/31/2025 |
| | **Total** | **$105,718** | **246.2%** | **31.4%** | **$94,468** | **211.2%** | **$18,640** | **646.5%** | **51** | **168.4%** | **92.7%** | **$2,073** | |
| **Total** | **Total** | **$109,073** | **229.3%** | **29.5%** | **$96,003** | **191.4%** | **$18,155** | **627.1%** | **52** | **147.6%** | **89.7%** | **$2,098** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 208 | 1 | $951 | 176 | 1 | $951 | 0.01 | 23 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **209** | **1** | **$951** | **177** | **1** | **951** | **0.01** | **23** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 111 | 21 | $35,771 | 95 | 17 | $28,331 | 0.18 | 5 | 1 | $1,903 | 20.0% | 10/31/2025 |
| | Home | 65 | 11 | $27,875 | 58 | 10 | $24,615 | 0.17 | 3 | 2 | $5,853 | 66.7% | 10/31/2025 |
| | Marine | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 11 | 3 | $3,745 | 11 | 3 | $3,745 | 0.27 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 2 | 1 | $608 | 2 | 1 | $608 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **193** | **36** | **$67,999** | **170** | **31** | **57,299** | **0.18** | **10** | **3** | **$7,756** | **30.0%** | |
| **Grand Total** | | **402** | **37** | **$68,950** | **347** | **32** | **58,250** | **0.09** | **33** | **3** | **$7,756** | **9.1%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Elizabeth Moy

Role: LBE

LBE UPN:176317

BEAL & WINN INSURANCE AGENCY LLC

Address: 3207 BRIARCREST DR

BRYAN TX 77802

Phone/Email: 9792681500 ANDY@BEALINSURANCE.COM

**TX**

# Agency Scorecard

## 176368, CARTERS INSURANCE AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Marine | $4,826 | 10.1% | 19.1% | $4,625 | 10.6% | $340 | -2.0% | 7 | -12.5% | 77.8% | $689 | 10/31/2025 |
| | Mobile Home | $0 | -100.0% | -399.1% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $1,106 | -19.4% | 3.2% | $1,106 | -32.0% | $0 | -100.0% | 3 | -25.0% | 75.0% | $369 | 10/31/2025 |
| | Off-Road Veh | $321 | 154.8% | 2.6% | $321 | -0.3% | $95 | -15.9% | 3 | 0.0% | 100.0% | $107 | 10/31/2025 |
| | Other | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $0 | -100.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Travel Trailer | $3,561 | -0.9% | 30.9% | $3,561 | -0.9% | $0 | 0.0% | 3 | 0.0% | 100.0% | $1,187 | 10/31/2025 |
| | **Total** | **$9,814** | **13.5%** | **16.0%** | **$9,613** | **3.1%** | **$435** | **-37.2%** | **16** | **-11.1%** | **84.2%** | **$613** | |
| **Total** | **Total** | **$9,814** | **13.5%** | **16.0%** | **$9,613** | **3.1%** | **$435** | **-37.2%** | **16** | **-11.1%** | **84.2%** | **$613** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 1 | 1 | $1,401 | 1 | 1 | $1,401 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Other | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **5** | **1** | **$1,401** | **5** | **1** | **1,401** | **0.20** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **5** | **1** | **$1,401** | **5** | **1** | **1,401** | **0.20** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:176368

CARTERS INSURANCE AGENCY INC

Address: 3109 E MOCKINGBIRD LN

VICTORIA TX 77904

Phone/Email: 3615755858 VICTORIA@CIAVICTORIA.COM

TX

# Agency Scorecard

## 233403, CARTERS INSURANCE AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $4,265 | 3.2% | 27.4% | $4,265 | 3.2% | $0 | 0.0% | 2 | 0.0% | 100.0% | $2,133 | 10/31/2025 |
| | Home | $4,700 | 9.3% | 32.9% | $4,700 | 9.3% | $0 | 0.0% | 2 | 0.0% | 100.0% | $2,350 | 10/31/2025 |
| | Marine | $283 | -63.3% | 17.1% | $283 | -63.3% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $8,665 | 4.4% | 39.5% | $4,727 | -43.1% | $0 | 0.0% | 3 | 0.0% | 100.0% | $2,888 | 10/31/2025 |
| | Motor Home | $2,465 | 9.3% | 14.2% | $2,465 | 9.3% | $0 | 0.0% | 2 | 0.0% | 100.0% | $1,233 | 10/31/2025 |
| | Motorcycle | $548 | 7.5% | 4.2% | $548 | 7.5% | $0 | 0.0% | 2 | 0.0% | 100.0% | $274 | 10/31/2025 |
| | **Total** | **$20,926** | **3.2%** | **31.1%** | **$16,988** | **-16.2%** | **$0** | **0.0%** | **11** | **-8.3%** | **91.7%** | **$1,902** | |
| **Total** | **Total** | **$20,926** | **3.2%** | **31.1%** | **$16,988** | **-16.2%** | **$0** | **0.0%** | **11** | **-8.3%** | **91.7%** | **$1,902** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: SUB

LBE UPN:176368

176368

CARTERS INSURANCE AGENCY INC

Address: 410 LOTT ST

YOAKUM TX 77995

Phone/Email: 3612935242 CIA@CARTERSINSURANCE.COM

**TX**

# Agency Scorecard

## 1275147, THE POLICY SOURCE LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| **Total** | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **1** | **0** | **$0** | **1** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **1** | **0** | **$0** | **1** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Leeona Wynne

Role: SUB

LBE UPN:1289213

1289213

THE POLICY SOURCE LLC

Address: 921 W NEW HOPE DR STE 501

CEDAR PARK TX 78613

Phone/Email: 5129567720 KENT@THEPOLICYSOURCE.COM

**TX**

# Agency Scorecard

## 1277968, RANCRAN GROUP LP

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $40,099 | 4.6% | 6.4% | $38,335 | 2.6% | $5,867 | 67.7% | 5 | 25.0% | 62.5% | $8,020 | 10/31/2025 |
| | **Total** | **$40,099** | **4.6%** | **6.4%** | **$38,335** | **2.6%** | **$5,867** | **67.7%** | **5** | **25.0%** | **62.5%** | **$8,020** | |
| Foremost Choice | Dwelling Fire | $73,185 | 56.2% | 26.4% | $57,156 | 49.9% | $13,548 | 15.4% | 32 | -3.0% | 78.0% | $2,287 | 10/31/2025 |
| | Home | $7,130 | -23.9% | 13.8% | $3,701 | -45.7% | $3,270 | 7.2% | 3 | 50.0% | 75.0% | $2,377 | 10/31/2025 |
| | Marine | $3,958 | -13.0% | 16.7% | $3,958 | -13.0% | $0 | 0.0% | 2 | -33.3% | 66.7% | $1,979 | 10/31/2025 |
| | Mobile Home | $39,238 | -4.1% | 29.8% | $28,723 | -12.0% | $0 | -100.0% | 25 | 0.0% | 75.8% | $1,570 | 10/31/2025 |
| | Motor Home | $1,315 | 93.7% | 9.8% | $1,315 | 93.7% | $0 | -100.0% | 1 | 9999.9% | 100.0% | $1,315 | 10/31/2025 |
| | Motorcycle | $2,469 | -29.8% | 3.5% | $1,795 | -36.4% | $0 | 0.0% | 3 | -40.0% | 60.0% | $823 | 10/31/2025 |
| | Off-Road Veh | $830 | 310.9% | 6.0% | $728 | 628.0% | $0 | -100.0% | 2 | 0.0% | 66.7% | $415 | 10/31/2025 |
| | Other | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $5,056 | -40.0% | 22.1% | $5,056 | -40.0% | $0 | -100.0% | 4 | -20.0% | 80.0% | $1,264 | 10/31/2025 |
| | Travel Trailer | $6,232 | 42.7% | 18.0% | $5,263 | 20.5% | $0 | -100.0% | 7 | 16.7% | 100.0% | $890 | 10/31/2025 |
| | **Total** | **$139,413** | **17.2%** | **25.4%** | **$107,695** | **9.3%** | **$16,818** | **32.0%** | **79** | **-2.5%** | **77.5%** | **$1,765** | |
| **Total** | **Total** | **$179,512** | **14.2%** | **21.2%** | **$146,030** | **7.5%** | **$22,685** | **39.7%** | **84** | **-1.2%** | **76.4%** | **$2,137** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 39 | 4 | $7,640 | 31 | 3 | $5,876 | 0.10 | 5 | 1 | $951 | 20.0% | 10/31/2025 |
| | **Total** | **39** | **4** | **$7,640** | **31** | **3** | **5,876** | **0.10** | **5** | **1** | **$951** | **20.0%** | |
| Foremost Choice | Dwelling Fire | 112 | 8 | $20,800 | 96 | 6 | $14,138 | 0.06 | 4 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 13 | 2 | $3,250 | 13 | 2 | $3,250 | 0.15 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 25 | 8 | $12,928 | 16 | 7 | $10,897 | 0.44 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 1 | 1 | $1,315 | 1 | 1 | $1,315 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 2 | 1 | $733 | 2 | 1 | $733 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Other | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 3 | 0 | $0 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 1 | 1 | $517 | 1 | 1 | $517 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **160** | **21** | **$39,543** | **135** | **18** | **30,850** | **0.13** | **7** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **199** | **25** | **$47,183** | **166** | **21** | **36,726** | **0.13** | **12** | **1** | **$951** | **8.3%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Jarrett Smith

Role: LBE

LBE UPN:1277968

RANCRAN GROUP LP

Address: 579 N VALLEY PKWY STE 100

LEWISVILLE TX 75067

Phone/Email: 9724362822 RANDY.CRANE@TEXASINSURANCEAGENCY.COM

# Agency Scorecard

**TX**

## 1278005, SAXON,SHELIA

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $12,194 | -59.0% | 23.9% | $3,977 | -76.3% | $0 | -100.0% | 6 | -33.3% | 66.7% | $2,032 | 10/31/2025 |
| | Home | $1,561 | -29.9% | 7.5% | $1,561 | -29.9% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,561 | 10/31/2025 |
| | Mobile Home | $6,010 | -2.2% | 32.4% | $4,484 | -27.0% | $0 | 0.0% | 4 | 0.0% | 100.0% | $1,503 | 10/31/2025 |
| | Motor Home | $1,006 | 9999.9% | 24.1% | $1,006 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $1,006 | 10/31/2025 |
| | Off-Road Veh | $172 | 2.4% | 3.5% | $172 | 2.4% | $0 | 0.0% | 1 | 0.0% | 100.0% | $172 | 10/31/2025 |
| | Rental M.H. | $3,963 | -37.2% | 26.5% | $3,963 | -37.2% | $0 | 0.0% | 3 | 0.0% | 100.0% | $1,321 | 10/31/2025 |
| | Travel Trailer | $1,457 | -12.6% | 26.5% | $1,457 | -12.6% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,457 | 10/31/2025 |
| | **Total** | **$26,363** | **-43.0%** | **25.0%** | **$16,620** | **-50.1%** | **$0** | **-100.0%** | **17** | **-10.5%** | **85.0%** | **$1,551** | |
| **Total** | **Total** | **$26,363** | **-43.0%** | **25.0%** | **$16,620** | **-50.1%** | **$0** | **-100.0%** | **17** | **-10.5%** | **85.0%** | **$1,551** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 3 | 0 | $0 | 3 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 1 | 1 | $1,006 | 1 | 1 | $1,006 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **5** | **1** | **$1,006** | **5** | **1** | **1,006** | **0.20** | **2** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **5** | **1** | **$1,006** | **5** | **1** | **1,006** | **0.20** | **2** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1278005

SAXON,SHELIA

Address: 1833 W HUNT ST STE 202B

MCKINNEY TX 75069

Phone/Email: 9725626950 SAXONS@THESAXONAGENCY.COM

**TX**

# Agency Scorecard

## 1278146, THE DANSBY GROUP LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $6,545 | 51.8% | 24.5% | $6,545 | 51.8% | $3,176 | 2.3% | 2 | 0.0% | 100.0% | $3,273 | 10/31/2025 |
| | Mobile Home | $1,746 | 2.0% | 32.1% | $1,746 | 2.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,746 | 10/31/2025 |
| | Rental M.H. | $1,043 | 9.3% | 32.2% | $1,043 | 9.3% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,043 | 10/31/2025 |
| | **Total** | **$9,334** | **33.7%** | **26.8%** | **$9,334** | **33.7%** | **$3,176** | **2.3%** | **4** | **0.0%** | **100.0%** | **$2,334** | |
| **Total** | **Total** | **$9,334** | **33.7%** | **26.8%** | **$9,334** | **33.7%** | **$3,176** | **2.3%** | **4** | **0.0%** | **100.0%** | **$2,334** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 2 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **2** | **0** | **$0** | **1** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 3 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **3** | **0** | **$0** | **2** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **5** | **0** | **$0** | **3** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1278146

THE DANSBY GROUP LLC

Address: 6401 ELDORADO PKWY STE 301

MCKINNEY TX 75070

Phone/Email: 4693434131 VDANSBY@DANSBYINS.COM

# Agency Scorecard

**TX**

## 1278518, MIKE THOMPSON INSURANCE AGENCY LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $27,716 | 79.1% | 2.1% | $26,385 | 90.5% | $4,519 | 500.1% | 7 | 40.0% | 63.6% | $3,959 | 10/31/2025 |
| | **Total** | **$27,716** | **24.1%** | **2.1%** | **$26,385** | **27.4%** | **$4,519** | **500.1%** | **7** | **40.0%** | **63.6%** | **$3,959** | |
| Foremost Choice | Dwelling Fire | $7,228 | 4.0% | 28.2% | $7,228 | 4.0% | $0 | 0.0% | 2 | 0.0% | 100.0% | $3,614 | 10/31/2025 |
| | Home | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $7,202 | -34.3% | 30.6% | $7,202 | -38.8% | $3,592 | 2.0% | 4 | -33.3% | 66.7% | $1,801 | 10/31/2025 |
| | Motor Home | $0 | -100.0% | 23.5% | $0 | -100.0% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Other | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $5,670 | 45.5% | 239.2% | $5,670 | 16.6% | $0 | 0.0% | 6 | 0.0% | 100.0% | $945 | 10/31/2025 |
| | Travel Trailer | $925 | -71.8% | 23.0% | $925 | -71.8% | $0 | 0.0% | 1 | -50.0% | 33.3% | $925 | 10/31/2025 |
| | **Total** | **$21,025** | **-24.0%** | **68.4%** | **$21,025** | **-28.6%** | **$3,592** | **2.0%** | **13** | **-23.5%** | **72.2%** | **$1,617** | |
| **Total** | **Total** | **$48,741** | **-2.5%** | **37.3%** | **$47,410** | **-5.5%** | **$8,111** | **89.8%** | **20** | **-9.1%** | **69.0%** | **$2,437** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 212 | 6 | $12,257 | 182 | 6 | $12,257 | 0.03 | 18 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **212** | **6** | **$12,257** | **182** | **6** | **12,257** | **0.03** | **18** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 12 | 0 | $0 | 11 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 4 | 0 | $0 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Other | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 4 | 1 | $2,285 | 4 | 1 | $2,285 | 0.25 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **22** | **1** | **$2,285** | **20** | **1** | **2,285** | **0.05** | **1** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **234** | **7** | **$14,542** | **202** | **7** | **14,542** | **0.03** | **19** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1278518

MIKE THOMPSON INSURANCE AGENCY LLC

Address: 5295 US HIGHWAY 377 S STE 100

AUBREY TX 76227

Phone/Email: 9403435713 MIKE@WRITINGINSURANCERIGHT.COM

# Agency Scorecard

**TX**

## 1279167, WADE HUNT INSURANCE GROUP LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $31,861 | 60.1% | 131.3% | $30,224 | 58.3% | $462 | -31.3% | 7 | -12.5% | 87.5% | $4,552 | 10/31/2025 |
| | **Total** | **$31,861** | **60.1%** | **131.3%** | **$30,224** | **58.3%** | **$462** | **-31.3%** | **7** | **-12.5%** | **87.5%** | **$4,552** | |
| Foremost Choice | Dwelling Fire | $46,503 | -12.3% | 26.0% | $47,414 | 9.7% | $3,527 | -35.5% | 19 | -9.5% | 90.5% | $2,448 | 10/31/2025 |
| | Marine | $357 | 0.0% | 7.8% | $0 | 0.0% | $0 | -100.0% | 1 | 0.0% | 100.0% | $357 | 10/31/2025 |
| | Mobile Home | $43,454 | -8.2% | 31.2% | $35,837 | -7.0% | $5,852 | 50.4% | 21 | -4.5% | 87.5% | $2,069 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Other | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $4,305 | 2.7% | 32.7% | $1,969 | -44.0% | $0 | -100.0% | 4 | 0.0% | 100.0% | $1,076 | 10/31/2025 |
| | Travel Trailer | $1,118 | 35.4% | 16.6% | $1,118 | 35.4% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,118 | 10/31/2025 |
| | **Total** | **$95,737** | **-9.4%** | **28.4%** | **$86,338** | **0.3%** | **$9,379** | **14.8%** | **46** | **-6.1%** | **90.2%** | **$2,081** | |
| **Total** | **Total** | **$127,598** | **1.6%** | **54.0%** | **$116,562** | **10.8%** | **$9,841** | **11.3%** | **53** | **-7.0%** | **89.8%** | **$2,408** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 417 | 0 | $0 | 359 | 0 | $0 | 0.00 | 29 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **417** | **0** | **$0** | **359** | **0** | **0** | **0.00** | **29** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 3 | 0 | $0 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 4 | 2 | $3,500 | 3 | 1 | $1,296 | 0.33 | 1 | 1 | $1,296 | 100.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Other | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 3 | 0 | $0 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **10** | **2** | **$3,500** | **9** | **1** | **1,296** | **0.11** | **1** | **1** | **$1,296** | **100.0%** | |
| **Grand Total** | | **427** | **2** | **$3,500** | **368** | **1** | **1,296** | **0.00** | **30** | **1** | **$1,296** | **3.3%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1279167

WADE HUNT INSURANCE GROUP LLC

Address: 303 N CARROLL BLVD STE 220

DENTON TX 76201

Phone/Email: 9405918581 WADE@WADEHUNTINSURANCE.COM

# Agency Scorecard

**TX**

## 1280868, NIHILL INSURANCE SERVICES LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $1,814 | -31.0% | 0.9% | $1,814 | -31.0% | $0 | -100.0% | 1 | 0.0% | 100.0% | $1,814 | 10/31/2025 |
| | **Total** | **$1,814** | **-31.0%** | **0.9%** | **$1,814** | **-31.0%** | **$0** | **-100.0%** | **1** | **0.0%** | **100.0%** | **$1,814** | |
| Foremost Choice | Dwelling Fire | $14,291 | -11.1% | 103.9% | $13,550 | 14.4% | $1,788 | 3.4% | 11 | -8.3% | 91.7% | $1,299 | 10/31/2025 |
| | Home | $8,631 | 59.2% | 30.1% | $2,364 | -56.4% | $0 | 0.0% | 3 | 50.0% | 100.0% | $2,877 | 10/31/2025 |
| | Mobile Home | $9,816 | 12.6% | 31.5% | $7,916 | 14.3% | $766 | 9999.9% | 7 | 16.7% | 116.7% | $1,402 | 10/31/2025 |
| | Motor Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Other | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $1,959 | -71.7% | 34.1% | $1,959 | -71.7% | $0 | -100.0% | 2 | -50.0% | 50.0% | $980 | 10/31/2025 |
| | Travel Trailer | $576 | 9999.9% | 28.2% | $576 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $576 | 10/31/2025 |
| | **Total** | **$35,273** | **-5.0%** | **59.9%** | **$26,365** | **-15.3%** | **$2,554** | **-54.7%** | **24** | **0.0%** | **92.3%** | **$1,470** | |
| **Total** | **Total** | **$37,087** | **-6.7%** | **57.1%** | **$28,179** | **-16.5%** | **$2,554** | **-52.1%** | **25** | **0.0%** | **92.6%** | **$1,483** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 8 | 0 | $0 | 6 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **8** | **0** | **$0** | **6** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 3 | 1 | $2,364 | 3 | 1 | $2,364 | 0.33 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 11 | 0 | $0 | 8 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Other | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 4 | 1 | $576 | 4 | 1 | $576 | 0.25 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **22** | **2** | **$2,940** | **19** | **2** | **2,940** | **0.11** | **1** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **30** | **2** | **$2,940** | **25** | **2** | **2,940** | **0.08** | **1** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Nicole White-Minott

Role: LBE

LBE UPN:1280868

NIHILL INSURANCE SERVICES LLC

Address: 18534 HIGHWAY 46 W STE 1B

SPRING BRANCH TX 78070

Phone/Email: 2106169445 PAUL@AIAOFTX.COM

# Agency Scorecard

**TX**

## 1281140, BROWN INSURANCE GROUP INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 999.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **999.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $1,946 | 9999.9% | 32.1% | $1,946 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 50.0% | $1,946 | 10/31/2025 |
| | Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 999.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Travel Trailer | $1,014 | -5.8% | 23.2% | $1,014 | -5.8% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,014 | 10/31/2025 |
| | **Total** | **$2,960** | **175.1%** | **18.5%** | **$2,960** | **175.1%** | **$0** | **0.0%** | **2** | **100.0%** | **66.7%** | **$1,480** | |
| **Total** | **Total** | **$2,960** | **175.1%** | **18.8%** | **$2,960** | **175.1%** | **$0** | **0.0%** | **2** | **100.0%** | **66.7%** | **$1,480** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 6 | 2 | $7,104 | 6 | 2 | $7,104 | 0.33 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **10** | **2** | **$7,104** | **10** | **2** | **7,104** | **0.20** | **2** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **10** | **2** | **$7,104** | **10** | **2** | **7,104** | **0.20** | **2** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1281140

BROWN INSURANCE GROUP INC

Address: 166 HARGRAVES DR STE C400-719

AUSTIN TX 78737

Phone/Email: 5125234002 CORY@BROWNATX.COM

# Agency Scorecard

**TX**

## 1282542, SAM BUENTELLO INSURANCE AGENCY, INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $35,318 | 6.6% | 0.9% | $27,624 | 6.8% | $8,275 | 645.5% | 4 | -42.9% | 36.4% | $8,830 | 10/31/2025 |
| | **Total** | **$35,318** | **6.6%** | **0.9%** | **$27,624** | **6.8%** | **$8,275** | **645.5%** | **4** | **-42.9%** | **36.4%** | **$8,830** | |
| Foremost Choice | Dwelling Fire | $4,034 | 220.7% | 27.7% | $4,034 | 220.7% | $0 | -100.0% | 3 | 50.0% | 100.0% | $1,345 | 10/31/2025 |
| | Home | $6,291 | -36.3% | 33.7% | $6,291 | -10.1% | $2,604 | -23.4% | 2 | -33.3% | 66.7% | $3,146 | 10/31/2025 |
| | Mobile Home | $2,853 | 9999.9% | 37.4% | $2,853 | 9999.9% | $0 | 0.0% | 2 | 9999.9% | 100.0% | $1,427 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Travel Trailer | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$13,178** | **20.4%** | **32.3%** | **$13,178** | **63.3%** | **$2,604** | **201.7%** | **7** | **40.0%** | **87.5%** | **$1,883** | |
| **Total** | **Total** | **$48,496** | **10.0%** | **9.1%** | **$40,802** | **20.2%** | **$10,879** | **451.4%** | **11** | **-8.3%** | **57.9%** | **$4,409** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 2 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 68 | 4 | $16,069 | 64 | 4 | $16,069 | 0.06 | 10 | 1 | $8,550 | 10.0% | 10/31/2025 |
| | **Total** | **70** | **4** | **$16,069** | **65** | **4** | **16,069** | **0.06** | **10** | **1** | **$8,550** | **10.0%** | |
| Foremost Choice | Dwelling Fire | 45 | 1 | $995 | 38 | 1 | $995 | 0.03 | 3 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 11 | 0 | $0 | 10 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 12 | 2 | $2,853 | 11 | 2 | $2,853 | 0.18 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 3 | 0 | $0 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **72** | **3** | **$3,848** | **63** | **3** | **3,848** | **0.05** | **4** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **142** | **7** | **$19,917** | **128** | **7** | **19,917** | **0.05** | **14** | **1** | **$8,550** | **7.1%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1282542

SAM BUENTELLO INSURANCE AGENCY, INC

Address: 2301 BAGDAD RD STE 302

CEDAR PARK TX 78613

Phone/Email: 5126462691 SAM@SAMBUENTELLOINSURANCE.COM

TX

# Agency Scorecard

## 1289213, HALO INSURANCE AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $8,199 | -68.7% | 23.3% | $9,248 | -34.4% | $4,946 | -44.5% | 5 | -28.6% | 71.4% | $1,640 | 10/31/2025 |
| | Home | $11,898 | 307.7% | 30.4% | $9,327 | 219.6% | $0 | 0.0% | 5 | 66.7% | 100.0% | $2,380 | 10/31/2025 |
| | Marine | $1,613 | 690.7% | 22.3% | $1,613 | 690.7% | $0 | 0.0% | 2 | 100.0% | 100.0% | $807 | 10/31/2025 |
| | Mobile Home | $9,438 | -39.2% | 31.9% | $6,481 | -30.0% | $0 | -100.0% | 6 | 0.0% | 75.0% | $1,573 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Other | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $1,802 | -1.6% | 31.9% | $1,802 | -1.6% | $0 | 0.0% | 2 | 0.0% | 100.0% | $901 | 10/31/2025 |
| | Travel Trailer | $2,674 | -3.1% | 25.5% | $2,674 | -3.1% | $0 | 0.0% | 2 | 0.0% | 100.0% | $1,337 | 10/31/2025 |
| | **Total** | **$35,624** | **-27.9%** | **27.8%** | **$31,145** | **0.2%** | **$4,946** | **-58.1%** | **22** | **4.8%** | **84.6%** | **$1,619** | |
| **Total** | **Total** | **$35,624** | **-27.9%** | **27.8%** | **$31,145** | **0.2%** | **$4,946** | **-58.1%** | **22** | **4.8%** | **84.6%** | **$1,619** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 109 | 0 | $0 | 82 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 72 | 2 | $6,169 | 54 | 1 | $3,598 | 0.02 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 1 | 1 | $1,397 | 1 | 1 | $1,397 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 5 | 2 | $3,721 | 3 | 2 | $3,721 | 0.67 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Other | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 4 | 0 | $0 | 4 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **192** | **5** | **$11,287** | **145** | **4** | **8,716** | **0.03** | **1** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **192** | **5** | **$11,287** | **145** | **4** | **8,716** | **0.03** | **1** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Leeona Wynne

Role: LBE

LBE UPN:1289213

HALO INSURANCE AGENCY INC

Address: 921 W NEW HOPE DR STE 402

CEDAR PARK TX 78613

Phone/Email: 5123369433 PATRICK@HALOINSURANCEGROUP.COM

# Agency Scorecard

**TX**

## 1306049, REGAL INSURANCE SERVICES LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $59 | -96.4% | 0.9% | $0 | -100.0% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$59** | **-96.4%** | **0.9%** | **$0** | **-100.0%** | **$0** | **0.0%** | **0** | **-100.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $27,886 | 267.1% | 26.8% | $27,886 | 170.0% | $0 | -100.0% | 11 | 175.0% | 84.6% | $2,535 | 10/31/2025 |
| | Home | $1,782 | 18.2% | 24.1% | $1,782 | 136.0% | $0 | -100.0% | 4 | 0.0% | 100.0% | $446 | 10/31/2025 |
| | Motorcycle | $50 | 9999.9% | 12.6% | $50 | 9999.9% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$29,718** | **226.5%** | **26.5%** | **$29,718** | **168.1%** | **$0** | **-100.0%** | **15** | **87.5%** | **83.3%** | **$1,981** | |
| **Total** | **Total** | **$29,777** | **177.7%** | **26.1%** | **$29,718** | **133.9%** | **$0** | **-100.0%** | **15** | **66.7%** | **78.9%** | **$1,985** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 45 | 0 | $0 | 31 | 0 | $0 | 0.00 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **45** | **0** | **$0** | **31** | **0** | **0** | **0.00** | **2** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 148 | 9 | $22,892 | 142 | 9 | $22,892 | 0.06 | 12 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 5 | 1 | $615 | 5 | 1 | $615 | 0.20 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **155** | **10** | **$23,507** | **149** | **10** | **23,507** | **0.07** | **12** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **200** | **10** | **$23,507** | **180** | **10** | **23,507** | **0.06** | **14** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1306049

REGAL INSURANCE SERVICES LLC

Address: 1634 W IRVING BLVD STE B

IRVING TX 75061

Phone/Email: 4695050829 HAYAT@REGALTI.COM

# Agency Scorecard

**TX**

## 1314668, AGENTRUBEN.COM LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $19,223 | 725.4% | 2.3% | $19,223 | 725.4% | $0 | 0.0% | 3 | 9999.9% | 100.0% | $6,408 | 10/31/2025 |
| | Personal Auto | $7,604 | 400.6% | 1.2% | $7,604 | 305.5% | $5,430 | 9999.9% | 3 | 9999.9% | 100.0% | $2,535 | 10/31/2025 |
| | **Total** | **$26,827** | **597.2%** | **2.0%** | **$26,827** | **538.1%** | **$5,430** | **9999.9%** | **6** | **9999.9%** | **100.0%** | **$4,471** | |
| Foremost Choice | Dwelling Fire | $15,855 | -27.0% | 27.9% | $14,259 | -26.5% | $2,083 | -27.6% | 13 | -18.8% | 76.5% | $1,220 | 10/31/2025 |
| | Home | $3,330 | 147.4% | 32.0% | $3,330 | 147.4% | ($1,943) | 0.0% | 2 | 100.0% | 40.0% | $1,665 | 10/31/2025 |
| | Mobile Home | $12,348 | -19.2% | 32.4% | $12,348 | 3.8% | $0 | 0.0% | 5 | 0.0% | 100.0% | $2,470 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $1,771 | 114.1% | 31.9% | $1,244 | 80.6% | $539 | 9999.9% | 2 | 0.0% | 100.0% | $886 | 10/31/2025 |
| | Travel Trailer | $2,549 | -16.5% | 24.0% | $2,549 | -16.5% | $0 | 0.0% | 2 | -33.3% | 66.7% | $1,275 | 10/31/2025 |
| | **Total** | **$35,853** | **-15.1%** | **29.5%** | **$33,730** | **-7.3%** | **$679** | **-76.4%** | **24** | **-11.1%** | **75.0%** | **$1,494** | |
| **Total** | **Total** | **$62,680** | **36.0%** | **26.3%** | **$60,557** | **49.2%** | **$6,109** | **112.3%** | **30** | **11.1%** | **78.9%** | **$2,089** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 18 | 3 | $13,540 | 17 | 3 | $13,540 | 0.18 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 24 | 3 | $7,099 | 24 | 3 | $7,099 | 0.13 | 9 | 2 | $4,925 | 22.2% | 10/31/2025 |
| | **Total** | **42** | **6** | **$20,639** | **41** | **6** | **20,639** | **0.15** | **10** | **2** | **$4,925** | **20.0%** | |
| Foremost Choice | Dwelling Fire | 24 | 1 | $2,899 | 20 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 7 | 4 | $10,041 | 6 | 4 | $10,041 | 0.67 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **31** | **5** | **$12,940** | **26** | **4** | **10,041** | **0.15** | **1** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **73** | **11** | **$33,579** | **67** | **10** | **30,680** | **0.15** | **11** | **2** | **$4,925** | **18.2%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1314668

AGENTRUBEN.COM LLC

Address: 7300 BLANCO RD STE 601

SAN ANTONIO TX 78216

Phone/Email: 2104049141 RUBEN@AGENTRUBEN.COM

# Agency Scorecard

**TX**

## 1317722, THE ROD HANKS AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $10,515 | -34.0% | 40.1% | $6,102 | -52.9% | $0 | 0.0% | 1 | -66.7% | 33.3% | $10,515 | 10/31/2025 |
| | **Total** | **$10,515** | **-34.0%** | **40.1%** | **$6,102** | **-52.9%** | **$0** | **0.0%** | **1** | **-66.7%** | **33.3%** | **$10,515** | |
| Foremost Choice | Dwelling Fire | $11,751 | 94.7% | 27.7% | $10,057 | 130.6% | $3,016 | 9999.9% | 7 | 40.0% | 87.5% | $1,679 | 10/31/2025 |
| | Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $22,428 | -4.5% | 33.0% | $21,227 | -5.0% | $2,452 | -54.6% | 11 | 0.0% | 84.6% | $2,039 | 10/31/2025 |
| | Motor Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $0 | -100.0% | -4.7% | $0 | -100.0% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Other | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $4,132 | -30.1% | 31.2% | $3,134 | -47.0% | $0 | 0.0% | 3 | -40.0% | 60.0% | $1,377 | 10/31/2025 |
| | Travel Trailer | $331 | -49.2% | 22.5% | ($314) | 0.0% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$38,642** | **10.9%** | **31.0%** | **$34,104** | **2.3%** | **$5,468** | **1.3%** | **21** | **-8.7%** | **75.0%** | **$1,840** | |
| **Total** | **Total** | **$49,157** | **-3.2%** | **33.0%** | **$40,206** | **-13.2%** | **$5,468** | **1.3%** | **22** | **-15.4%** | **71.0%** | **$2,234** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 46 | 0 | $0 | 43 | 0 | $0 | 0.00 | 17 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **46** | **0** | **$0** | **43** | **0** | **0** | **0.00** | **17** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 17 | 3 | $8,495 | 15 | 3 | $8,495 | 0.20 | 2 | 1 | $3,016 | 50.0% | 10/31/2025 |
| | Home | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 12 | 2 | $6,587 | 9 | 2 | $6,587 | 0.22 | 0 | 1 | $2,452 | 0.0% | 10/31/2025 |
| | Motor Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Other | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **33** | **5** | **$15,082** | **28** | **5** | **15,082** | **0.18** | **2** | **2** | **$5,468** | **100.0%** | |
| **Grand Total** | | **79** | **5** | **$15,082** | **71** | **5** | **15,082** | **0.07** | **19** | **2** | **$5,468** | **10.5%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1317722

THE ROD HANKS AGENCY INC

Address: 6300 SAMUELL BLVD STE 105

DALLAS TX 75228

Phone/Email: 2142758372 INFO@HANKSGROUP.COM

# Agency Scorecard

**TX**

## 1450795, THE BROTHERS INS GRP INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $12,418 | -14.1% | -35.6% | $8,402 | -32.0% | $375 | -133.1% | 4 | -20.0% | 40.0% | $3,105 | 10/31/2025 |
| | **Total** | **$12,418** | **-14.1%** | **-35.6%** | **$8,402** | **-32.0%** | **$375** | **-133.1%** | **4** | **-20.0%** | **40.0%** | **$3,105** | |
| Foremost Choice | Dwelling Fire | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Home | $0 | -100.0% | 24.9% | $0 | 0.0% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | ($356) | -146.3% | -11.3% | ($356) | -146.3% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Travel Trailer | $211 | 9999.9% | 28.5% | ($790) | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **($145)** | **-103.7%** | **15.8%** | **($1,146)** | **-249.0%** | **$0** | **0.0%** | **0** | **-100.0%** | **0.0%** | **$0** | |
| **Total** | **Total** | **$12,273** | **-33.1%** | **-30.7%** | **$7,256** | **-44.7%** | **$375** | **-133.1%** | **4** | **-42.9%** | **30.8%** | **$3,068** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 4 | 0 | $0 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 359 | 5 | $11,062 | 301 | 4 | $7,578 | 0.01 | 43 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **363** | **5** | **$11,062** | **304** | **4** | **7,578** | **0.01** | **43** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 3 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 1 | 1 | $1,001 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **5** | **1** | **$1,001** | **3** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **368** | **6** | **$12,063** | **307** | **4** | **7,578** | **0.01** | **43** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1450795

THE BROTHERS INS GRP INC

Address: 20842 US HIGHWAY 59 STE C

NEW CANEY TX 77357

Phone/Email: 7139959422 OPERATIONS@GOBIGINS.COM

**UT**

# Agency Scorecard

## 1494505, RYAN ENGLUND INSURANCE AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $6,465 | 185.6% | 9.3% | $6,465 | 185.6% | $0 | 0.0% | 4 | 100.0% | 100.0% | $1,616 | 10/31/2025 |
| | Home | $1,971 | 9999.9% | 11.1% | $1,971 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $1,971 | 10/31/2025 |
| | Marine | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $898 | -8.4% | 10.2% | $898 | -8.4% | $0 | 0.0% | 1 | 0.0% | 100.0% | $898 | 10/31/2025 |
| | Motor Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $0 | -100.0% | 0.8% | $0 | -100.0% | $0 | -100.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Off-Road Veh | $220 | 9999.9% | 12.6% | $220 | 9999.9% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $2,048 | 8.9% | 8.9% | $2,048 | 8.9% | $0 | 0.0% | 1 | 0.0% | 100.0% | $2,048 | 10/31/2025 |
| | Travel Trailer | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$11,602** | **109.0%** | **9.4%** | **$11,602** | **109.0%** | **$0** | **-100.0%** | **7** | **75.0%** | **100.0%** | **$1,657** | |
| **Total** | **Total** | **$11,602** | **109.0%** | **9.4%** | **$11,602** | **109.0%** | **$0** | **-100.0%** | **7** | **75.0%** | **100.0%** | **$1,657** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 368 | 0 | $0 | 328 | 0 | $0 | 0.00 | 21 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **368** | **0** | **$0** | **328** | **0** | **0** | **0.00** | **21** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 13 | 2 | $4,228 | 12 | 2 | $4,228 | 0.17 | 3 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 4 | 1 | $1,971 | 4 | 1 | $1,971 | 0.25 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **21** | **3** | **$6,199** | **20** | **3** | **6,199** | **0.15** | **3** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **389** | **3** | **$6,199** | **348** | **3** | **6,199** | **0.01** | **24** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1494505

RYAN ENGLUND INSURANCE AGENCY INC

Address: 350 W CENTER ST

OREM UT 84057

Phone/Email: 3854068886 RYAN@ENGLUNDGROUP.COM

# Agency Scorecard

**VA**

## 1282582, THE BLANKENSHIP AGENCY LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $35,546 | -0.6% | 58.3% | $29,893 | -4.6% | $400 | -74.6% | 29 | -6.5% | 93.5% | $1,226 | 10/31/2025 |
| | Motorcycle | $167 | 21.9% | 4.7% | $167 | 21.9% | $0 | 0.0% | 1 | 0.0% | 100.0% | $167 | 10/31/2025 |
| | Off-Road Veh | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $4,638 | -23.8% | 181.0% | $4,405 | -17.2% | $1,590 | -1.2% | 9 | -25.0% | 69.2% | $515 | 10/31/2025 |
| | Travel Trailer | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$40,351** | **-3.9%** | **72.6%** | **$34,465** | **-6.4%** | **$1,990** | **-37.4%** | **39** | **-11.4%** | **86.7%** | **$1,035** | |
| **Total** | **Total** | **$40,351** | **-3.9%** | **72.6%** | **$34,465** | **-6.4%** | **$1,990** | **-37.4%** | **39** | **-11.4%** | **86.7%** | **$1,035** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 7 | 0 | $0 | 7 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 1 | $183 | 1 | 1 | $183 | 1.00 | 1 | 1 | $183 | 100.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **8** | **1** | **$183** | **8** | **1** | **183** | **0.13** | **1** | **1** | **$183** | **100.0%** | |
| **Grand Total** | | **8** | **1** | **$183** | **8** | **1** | **183** | **0.13** | **1** | **1** | **$183** | **100.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1282582

THE BLANKENSHIP AGENCY LLC

Address: 2081 FINCASTLE TPKE

TAZEWELL VA 24651

Phone/Email: 2769884861 DAVID.BLANKENSHIP@THEBLANKENSHIPAGENCY.COM

# Agency Scorecard

**VA**

## 1282593, THE BLANKENSHIP AGENCY LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Mobile Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| **Total** | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Mobile Home | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **1** | **0** | **$0** | **1** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **1** | **0** | **$0** | **1** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Terminated Accounts

Role: SUB

LBE UPN:1282582

1282582

THE BLANKENSHIP AGENCY LLC

Address: 354 S COLLEGE AVE

BLUEFIELD VA 24605

Phone/Email: 2763261461

VA

# Agency Scorecard

## 1294876, MEQUELL GREEN INSURANCE AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $5,102 | 13.5% | 13.8% | $0 | 0.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $5,102 | 10/31/2025 |
| | Home | $1,180 | 1.9% | 13.8% | $1,180 | 1.9% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,180 | 10/31/2025 |
| | Mobile Home | $8,107 | 72.3% | 87.5% | $3,244 | -21.8% | $0 | 0.0% | 5 | 0.0% | 100.0% | $1,621 | 10/31/2025 |
| | Off-Road Veh | $107 | 0.0% | 3.6% | $0 | 0.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $107 | 10/31/2025 |
| | Rental M.H. | $1,642 | 9.7% | 22.6% | $0 | -100.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,642 | 10/31/2025 |
| | **Total** | **$16,138** | **34.9%** | **52.1%** | **$4,424** | **-35.0%** | **$0** | **0.0%** | **9** | **0.0%** | **100.0%** | **$1,793** | |
| **Total** | **Total** | **$16,138** | **34.9%** | **52.1%** | **$4,424** | **-35.0%** | **$0** | **0.0%** | **9** | **0.0%** | **100.0%** | **$1,793** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 118 | 0 | $0 | 77 | 0 | $0 | 0.00 | 8 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **118** | **0** | **$0** | **77** | **0** | **0** | **0.00** | **8** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 5 | 0 | $0 | 5 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 3 | 0 | $0 | 3 | 0 | $0 | 0.00 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **8** | **0** | **$0** | **8** | **0** | **0** | **0.00** | **3** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **126** | **0** | **$0** | **85** | **0** | **0** | **0.00** | **11** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1294876

MEQUELL GREEN INSURANCE AGENCY INC

Address: 10160 STAPLES MILL RD STE 104

GLEN ALLEN VA 23060

Phone/Email: 8046727222 MEQUELL@MGREENINS.COM

# Agency Scorecard

**VA**

## 1325978, CLYBURN,JOHN CRUMP

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $1,690 | -42.0% | 22.3% | $1,690 | -42.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,690 | 10/31/2025 |
| | **Total** | **$1,690** | **-42.0%** | **22.3%** | **$1,690** | **-42.0%** | **$0** | **0.0%** | **1** | **0.0%** | **100.0%** | **$1,690** | |
| **Total** | **Total** | **$1,690** | **-42.0%** | **22.3%** | **$1,690** | **-42.0%** | **$0** | **0.0%** | **1** | **0.0%** | **100.0%** | **$1,690** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 399 | 0 | $0 | 362 | 0 | $0 | 0.00 | 24 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **399** | **0** | **$0** | **362** | **0** | **0** | **0.00** | **24** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 3 | 0 | $0 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 5 | 0 | $0 | 5 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **10** | **0** | **$0** | **10** | **0** | **0** | **0.00** | **1** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **409** | **0** | **$0** | **372** | **0** | **0** | **0.00** | **25** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1325978

CLYBURN,JOHN CRUMP

Address: 2901 S LYNNHAVEN RD STE 250

VIRGINIA BEACH VA 23452

Phone/Email: 7574902346 JOHN@CLYBURNINS.COM

VA

# Agency Scorecard

## 1375912, JOHNSON,JEFFERSON WALLER

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $969 | 0.8% | 12.9% | $0 | -100.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $969 | 10/31/2025 |
| | Marine | $292 | 1.4% | 17.0% | $292 | 1.4% | $0 | 0.0% | 1 | 0.0% | 100.0% | $292 | 10/31/2025 |
| | Rental M.H. | $0 | 0.0% | 999.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$1,261** | **1.0%** | **14.1%** | **$292** | **-139.5%** | **$0** | **0.0%** | **2** | **0.0%** | **100.0%** | **$631** | |
| **Total** | **Total** | **$1,261** | **1.0%** | **14.1%** | **$292** | **-139.5%** | **$0** | **0.0%** | **2** | **0.0%** | **100.0%** | **$631** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1375912

JOHNSON,JEFFERSON WALLER

Address: 3200 IRONBOUND RD STE B

WILLIAMSBURG VA 23188

Phone/Email: 7572296045 JEFFJOHNSONAGENCY@GMAIL.COM

VT

# Agency Scorecard

## 1333128, JAIMES L. FEWER AGENCY, INC.

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $16,883 | -11.1% | 5.4% | $14,516 | -14.0% | ($4,156) | -178.4% | 8 | 0.0% | 72.7% | $2,110 | 10/31/2025 |
| | Home | $3,444 | 7.6% | 8.2% | $3,444 | 7.6% | $0 | 0.0% | 3 | 0.0% | 100.0% | $1,148 | 10/31/2025 |
| | Marine | $172 | 0.0% | -8.9% | $172 | 0.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $172 | 10/31/2025 |
| | Mobile Home | $40,395 | 0.0% | 20.7% | $33,697 | -8.4% | $0 | -100.0% | 45 | -4.3% | 81.8% | $898 | 10/31/2025 |
| | Motor Home | $2,942 | -2.2% | 8.4% | $2,942 | -2.2% | $0 | 0.0% | 3 | 0.0% | 100.0% | $981 | 10/31/2025 |
| | Motorcycle | $2,434 | 1.5% | 3.6% | $1,480 | 1.2% | $0 | 0.0% | 4 | -20.0% | 80.0% | $609 | 10/31/2025 |
| | Off-Road Veh | $2,807 | 4.7% | 2.2% | $1,188 | 55.1% | $0 | -100.0% | 10 | -23.1% | 76.9% | $281 | 10/31/2025 |
| | Rental M.H. | $2,265 | 3.5% | 10.9% | $2,265 | 65.8% | $0 | -100.0% | 2 | 0.0% | 100.0% | $1,133 | 10/31/2025 |
| | Travel Trailer | $1,624 | 2.3% | 14.1% | $1,624 | 2.3% | $0 | 0.0% | 4 | 0.0% | 80.0% | $406 | 10/31/2025 |
| | **Total** | **$72,966** | **-2.2%** | **14.6%** | **$61,328** | **-6.0%** | **($4,156)** | **-150.0%** | **80** | **-7.0%** | **81.6%** | **$912** | |
| **Total** | **Total** | **$72,966** | **-2.2%** | **14.6%** | **$61,328** | **-6.0%** | **($4,156)** | **-150.0%** | **80** | **-7.0%** | **81.6%** | **$912** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | 15 | 3 | $7,721 | 8 | 3 | $7,721 | 0.38 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 18 | 8 | $6,724 | 16 | 6 | $4,876 | 0.38 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 2 | 1 | $660 | 2 | 1 | $660 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **36** | **12** | **$15,105** | **27** | **10** | **13,257** | **0.37** | **1** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **36** | **12** | **$15,105** | **27** | **10** | **13,257** | **0.37** | **1** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1333128

JAIMES L. FEWER AGENCY, INC.

Address: 3 MAPLE AVE

BARRE VT 05641

Phone/Email: 8024765050 JAIME@FEWERAGENCY.COM

VT

# Agency Scorecard

## 1360643, JAIMES L. FEWER AGENCY, INC.

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $41,463 | 27.0% | 4.0% | $30,903 | 21.2% | $5,632 | 8.1% | 27 | 17.4% | 84.4% | $1,536 | 10/31/2025 |
| | Home | $10,179 | -13.0% | 2.5% | $8,583 | -15.8% | $0 | -100.0% | 5 | -16.7% | 83.3% | $2,036 | 10/31/2025 |
| | Marine | $422 | 0.0% | 16.4% | $422 | 0.0% | $0 | -100.0% | 1 | 0.0% | 100.0% | $422 | 10/31/2025 |
| | Mobile Home | $25,833 | 0.7% | -8.7% | $20,535 | -7.6% | $3,255 | 13.5% | 30 | -6.3% | 88.2% | $861 | 10/31/2025 |
| | Motor Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motorcycle | $227 | 52.3% | 4.3% | $227 | 52.3% | $0 | 0.0% | 1 | 0.0% | 100.0% | $227 | 10/31/2025 |
| | Off-Road Veh | $1,401 | -30.1% | -0.1% | $517 | -46.4% | $221 | -3.9% | 6 | -14.3% | 75.0% | $234 | 10/31/2025 |
| | Rental M.H. | $556 | -145.4% | 3.7% | $556 | -145.4% | $0 | 0.0% | 1 | 0.0% | 100.0% | $556 | 10/31/2025 |
| | Travel Trailer | $292 | -5.2% | 14.9% | $292 | -5.2% | $0 | 0.0% | 2 | 0.0% | 100.0% | $146 | 10/31/2025 |
| | **Total** | **$80,373** | **12.2%** | **-0.7%** | **$62,035** | **6.0%** | **$9,108** | **148.9%** | **73** | **0.0%** | **85.9%** | **$1,101** | |
| **Total** | **Total** | **$80,373** | **12.2%** | **-0.7%** | **$62,035** | **6.0%** | **$9,108** | **148.9%** | **73** | **0.0%** | **85.9%** | **$1,101** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 33 | 9 | $15,334 | 29 | 8 | $11,759 | 0.28 | 3 | 1 | $1,138 | 33.3% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 8 | 2 | $1,781 | 7 | 2 | $1,781 | 0.29 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 1 | 1 | $112 | 1 | 1 | $112 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 2 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **44** | **12** | **$17,227** | **39** | **11** | **13,652** | **0.28** | **6** | **1** | **$1,138** | **16.7%** | |
| **Grand Total** | | **44** | **12** | **$17,227** | **39** | **11** | **13,652** | **0.28** | **6** | **1** | **$1,138** | **16.7%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Erica Carey

Role: SUB

LBE UPN:1333128

1333128

JAIMES L. FEWER AGENCY, INC.

Address: 3 MAPLE AVE

BARRE VT 05641

Phone/Email: 8022572065 JESSICA@FEWERAGENCY.COM

# Agency Scorecard

**WA**

## 1289765, THE INSURANCE ALLIANCE LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $12,652 | -29.1% | -10.9% | $10,209 | -40.9% | $0 | -100.0% | 1 | -66.7% | 33.3% | $12,652 | 10/31/2025 |
| | **Total** | **$12,652** | **-29.1%** | **-10.9%** | **$10,209** | **-40.9%** | **$0** | **-100.0%** | **1** | **-66.7%** | **33.3%** | **$12,652** | |
| Foremost Choice | Dwelling Fire | $78,955 | 247.5% | 8.2% | $72,013 | 227.7% | $29,244 | -791.5% | 34 | 161.5% | 73.9% | $2,322 | 10/31/2025 |
| | Home | $36,645 | 150.4% | 10.1% | $34,545 | 183.5% | $6,127 | 183.1% | 16 | 220.0% | 80.0% | $2,290 | 10/31/2025 |
| | Mobile Home | $30,210 | 6.7% | 18.4% | $27,659 | 6.9% | ($9) | -100.7% | 20 | 5.3% | 87.0% | $1,511 | 10/31/2025 |
| | Motorcycle | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Off-Road Veh | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $5,167 | -23.3% | 10.5% | $5,167 | 4.5% | $2,003 | 2.4% | 3 | 0.0% | 100.0% | $1,722 | 10/31/2025 |
| | Travel Trailer | $2,153 | 9999.9% | 27.5% | $2,153 | 9999.9% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$153,130** | **111.5%** | **12.6%** | **$141,537** | **117.8%** | **$37,365** | **3088.1%** | **73** | **82.5%** | **78.5%** | **$2,098** | |
| **Total** | **Total** | **$165,782** | **83.6%** | **9.1%** | **$151,746** | **84.5%** | **$37,365** | **1488.6%** | **74** | **72.1%** | **77.1%** | **$2,240** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 119 | 0 | $0 | 90 | 0 | $0 | 0.00 | 10 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **119** | **0** | **$0** | **90** | **0** | **0** | **0.00** | **10** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 117 | 33 | $86,586 | 103 | 29 | $75,590 | 0.28 | 19 | 9 | $32,328 | 47.4% | 10/31/2025 |
| | Home | 36 | 15 | $29,500 | 31 | 14 | $27,400 | 0.45 | 9 | 3 | $6,127 | 33.3% | 10/31/2025 |
| | Mobile Home | 12 | 4 | $7,545 | 10 | 4 | $7,545 | 0.40 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 4 | 1 | $3,094 | 3 | 1 | $3,094 | 0.33 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **171** | **53** | **$126,725** | **149** | **48** | **113,629** | **0.32** | **30** | **12** | **$38,455** | **40.0%** | |
| **Grand Total** | | **290** | **53** | **$126,725** | **239** | **48** | **113,629** | **0.20** | **40** | **12** | **$38,455** | **30.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Deke Moen

Role: LBE

LBE UPN:1289765

THE INSURANCE ALLIANCE LLC

Address: 3911 9TH ST SW STE 204

PUYALLUP WA 98373

Phone/Email: 2536424010 KEVIN@THEINSALLIANCE.COM

# Agency Scorecard

**WA**

## 1300233, MAWAKII INSURANCE AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **-100.0%** | **0.0%** | **$0** | **-100.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| **Total** | **Total** | **$0** | **-100.0%** | **0.0%** | **$0** | **-100.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 6 | 0 | $0 | 6 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **6** | **0** | **$0** | **6** | **0** | **0** | **0.00** | **1** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **6** | **0** | **$0** | **6** | **0** | **0** | **0.00** | **1** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1300233

MAWAKII INSURANCE AGENCY INC

Address: 31224 PETE VON REICHBAUER WAY

FEDERAL WAY WA 98003

Phone/Email: 2066171822 MAWAKIIAGENCY@OUTLOOK.COM

WI

# Agency Scorecard

## 181126, CLIFF INS AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $49,623 | 15.1% | 57.5% | $38,365 | 8.1% | $650 | -88.9% | 19 | 11.8% | 57.6% | $2,612 | 10/31/2025 |
| | **Total** | **$49,623** | **15.1%** | **57.5%** | **$38,365** | **8.1%** | **$650** | **-88.9%** | **19** | **11.8%** | **57.6%** | **$2,612** | |
| Foremost Choice | Dwelling Fire | $47,363 | 18.6% | 11.5% | $45,181 | 13.5% | $3,484 | -36.6% | 30 | 0.0% | 83.3% | $1,579 | 10/31/2025 |
| | Home | $4,243 | -45.3% | 9.0% | $5,742 | -31.0% | $0 | -100.0% | 6 | -14.3% | 60.0% | $707 | 10/31/2025 |
| | Marine | $606 | 359.1% | 12.0% | $373 | 182.6% | $239 | 9999.9% | 2 | 100.0% | 100.0% | $303 | 10/31/2025 |
| | Mobile Home | $13,537 | 118.2% | 15.1% | $10,394 | 165.9% | $763 | -264.1% | 13 | 116.7% | 86.7% | $1,041 | 10/31/2025 |
| | Motor Home | $724 | -1.6% | 5.7% | $724 | -1.6% | $0 | 0.0% | 1 | 0.0% | 100.0% | $724 | 10/31/2025 |
| | Motorcycle | $651 | 0.0% | 2.1% | $651 | 0.0% | $0 | 0.0% | 2 | 0.0% | 100.0% | $326 | 10/31/2025 |
| | Off-Road Veh | ($99) | -116.5% | -7.5% | ($99) | -116.5% | $248 | -58.7% | 1 | -50.0% | 50.0% | ($99) | 10/31/2025 |
| | Travel Trailer | $2,634 | 34.9% | 17.4% | $2,634 | 34.9% | ($310) | -162.0% | 4 | 0.0% | 66.7% | $659 | 10/31/2025 |
| | **Total** | **$69,659** | **20.2%** | **11.5%** | **$65,600** | **16.9%** | **$4,424** | **-47.6%** | **59** | **11.3%** | **79.7%** | **$1,181** | |
| **Total** | **Total** | **$119,282** | **18.0%** | **32.3%** | **$103,965** | **13.5%** | **$5,074** | **-64.5%** | **78** | **11.4%** | **72.9%** | **$1,529** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 403 | 16 | $21,083 | 356 | 14 | $16,554 | 0.04 | 38 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **403** | **16** | **$21,083** | **356** | **14** | **16,554** | **0.04** | **38** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 17 | 6 | $10,809 | 14 | 5 | $10,334 | 0.36 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 6 | 3 | $6,083 | 6 | 3 | $6,083 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 1 | 1 | $233 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 14 | 9 | $6,615 | 10 | 5 | $3,277 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 5 | 2 | $1,417 | 4 | 2 | $1,417 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **43** | **21** | **$25,157** | **34** | **15** | **21,111** | **0.44** | **1** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **446** | **37** | **$46,240** | **390** | **29** | **37,665** | **0.07** | **39** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Alexander Kosjer

Role: LBE

LBE UPN:181126

CLIFF INS AGENCY INC

Address: 2009 W BELTLINE HWY STE 100

MADISON WI 53713

Phone/Email: 6082038585 DENNIS@CLIFFINSURANCE.COM

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# Agency Scorecard

## 181406, OSHKOSH INSURANCE AGENCY, INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $19,419 | -32.3% | 12.4% | $7,406 | -72.5% | ($4,562) | -629.8% | 18 | -14.3% | 62.1% | $1,079 | 10/31/2025 |
| | Home | $12,794 | 92.0% | 13.3% | $9,558 | 95.2% | $0 | -100.0% | 8 | 60.0% | 100.0% | $1,599 | 10/31/2025 |
| | Marine | $453 | 5.1% | 15.1% | $453 | 5.1% | $0 | 0.0% | 1 | 0.0% | 100.0% | $453 | 10/31/2025 |
| | Mobile Home | $4,249 | 36.7% | 16.9% | $3,549 | 44.7% | $700 | 9999.9% | 5 | 0.0% | 83.3% | $850 | 10/31/2025 |
| | Motorcycle | $1,677 | 9999.9% | 11.0% | $1,677 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 33.3% | $1,677 | 10/31/2025 |
| | Off-Road Veh | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Rental M.H. | $571 | 6.7% | 14.1% | $0 | 0.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $571 | 10/31/2025 |
| | Travel Trailer | $205 | 9999.9% | 21.2% | $205 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $205 | 10/31/2025 |
| | **Total** | **$39,368** | **-0.1%** | **13.0%** | **$22,848** | **-34.2%** | **($3,862)** | **-266.2%** | **35** | **6.1%** | **71.4%** | **$1,125** | |
| **Total** | **Total** | **$39,368** | **-0.1%** | **13.0%** | **$22,848** | **-34.2%** | **($3,862)** | **-266.2%** | **35** | **6.1%** | **71.4%** | **$1,125** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 20 | 8 | $16,874 | 15 | 5 | $9,402 | 0.33 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 10 | 3 | $4,087 | 7 | 2 | $2,420 | 0.29 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 5 | 1 | $683 | 5 | 1 | $683 | 0.20 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 3 | 3 | $2,241 | 3 | 3 | $2,241 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 4 | 1 | $113 | 4 | 1 | $113 | 0.25 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **45** | **16** | **$23,998** | **37** | **12** | **14,859** | **0.32** | **1** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **45** | **16** | **$23,998** | **37** | **12** | **14,859** | **0.32** | **1** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Matt Punzel

Role: LBE

LBE UPN:181406

OSHKOSH INSURANCE AGENCY, INC

Address: 310 W IRVING AVE

OSHKOSH WI 54901

Phone/Email: 9204265520 TOM@OSHKOSHINSURANCESERVICES.COM

WI

# Agency Scorecard

## 1041885, ACTION INSURANCE AGENCY

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $71,389 | 37.8% | 199.7% | $54,271 | 46.2% | $2,638 | 79.1% | 35 | 84.2% | 68.6% | $2,040 | 10/31/2025 |
| | **Total** | **$71,389** | **37.8%** | **199.7%** | **$54,271** | **46.2%** | **$2,638** | **79.1%** | **35** | **84.2%** | **68.6%** | **$2,040** | |
| Foremost Choice | Dwelling Fire | $1,290 | -43.2% | 11.0% | $1,290 | -43.2% | ($1,179) | 0.0% | 1 | -50.0% | 50.0% | $1,290 | 10/31/2025 |
| | Home | $4,224 | -42.2% | 9.5% | $5,834 | -20.2% | $0 | 0.0% | 3 | -25.0% | 75.0% | $1,408 | 10/31/2025 |
| | Mobile Home | $8,494 | 74.0% | 22.5% | $7,723 | 145.7% | $1,341 | -365.5% | 8 | 33.3% | 80.0% | $1,062 | 10/31/2025 |
| | Motorcycle | $0 | -100.0% | -18.5% | $0 | -100.0% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Off-Road Veh | $0 | -100.0% | -103.8% | $0 | -100.0% | $0 | -100.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Travel Trailer | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$14,008** | **-7.1%** | **14.4%** | **$14,847** | **15.3%** | **$162** | **-125.6%** | **12** | **-7.7%** | **70.6%** | **$1,167** | |
| **Total** | **Total** | **$85,397** | **27.7%** | **164.2%** | **$69,118** | **38.2%** | **$2,800** | **233.3%** | **47** | **46.9%** | **69.1%** | **$1,817** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 412 | 32 | $42,599 | 354 | 22 | $28,854 | 0.06 | 49 | 1 | $1,259 | 2.0% | 10/31/2025 |
| | **Total** | **412** | **32** | **$42,599** | **354** | **22** | **28,854** | **0.06** | **49** | **1** | **$1,259** | **2.0%** | |
| Foremost Choice | Dwelling Fire | 5 | 0 | $0 | 4 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 10 | 4 | $4,024 | 9 | 4 | $4,024 | 0.44 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 2 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **19** | **4** | **$4,024** | **16** | **4** | **4,024** | **0.25** | **1** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **431** | **36** | **$46,623** | **370** | **26** | **32,878** | **0.07** | **50** | **1** | **$1,259** | **2.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Alexander Kosjer

Role: SUB

LBE UPN:181126

181126

ACTION INSURANCE AGENCY

Address: 2009 W BELTLINE HWY STE 101

MADISON WI 53713

Phone/Email: 6082224555 TOM@ACTIONINSURANCEAGENCY.COM

WI

# Agency Scorecard

## 1079147, THE MVP INSURANCE AGENCY LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $5,856 | 35.8% | 13.2% | $4,590 | 6.5% | $0 | -100.0% | 4 | 100.0% | 57.1% | $1,464 | 10/31/2025 |
| | Home | $1,672 | 9999.9% | 16.2% | $1,672 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $1,672 | 10/31/2025 |
| | Mobile Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Motor Home | $1,769 | -1.5% | 13.1% | $1,769 | -1.5% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,769 | 10/31/2025 |
| | Motorcycle | $62,811 | 41.8% | 10.1% | $52,807 | 46.8% | $8,711 | -22.6% | 78 | 62.5% | 83.9% | $805 | 10/31/2025 |
| | Off-Road Veh | $261 | -25.2% | 2.0% | $75 | -6.3% | $0 | 0.0% | 2 | 0.0% | 100.0% | $131 | 10/31/2025 |
| | Travel Trailer | $490 | -3.2% | 23.8% | $490 | -3.2% | $1 | 0.0% | 1 | 0.0% | 100.0% | $490 | 10/31/2025 |
| | **Total** | **$72,859** | **42.1%** | **10.6%** | **$61,403** | **43.9%** | **$8,712** | **-11.3%** | **87** | **61.1%** | **82.9%** | **$837** | |
| **Total** | **Total** | **$72,859** | **42.1%** | **10.6%** | **$61,403** | **43.9%** | **$8,712** | **-11.3%** | **87** | **61.1%** | **82.9%** | **$837** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Commercial Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 15 | 5 | $7,216 | 12 | 4 | $5,950 | 0.33 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 4 | 1 | $1,672 | 4 | 1 | $1,672 | 0.25 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 3 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 317 | 45 | $36,548 | 283 | 41 | $34,127 | 0.14 | 30 | 4 | $4,762 | 13.3% | 10/31/2025 |
| | Off-Road Veh | 6 | 0 | $0 | 4 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 4 | 0 | $0 | 4 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **351** | **51** | **$45,436** | **311** | **46** | **41,749** | **0.15** | **31** | **4** | **$4,762** | **12.9%** | |
| **Grand Total** | | **351** | **51** | **$45,436** | **311** | **46** | **41,749** | **0.15** | **31** | **4** | **$4,762** | **12.9%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Ashley White

Role: LBE

LBE UPN:1079147

THE MVP INSURANCE AGENCY LLC

Address: 10 TAUNTON CIR

MADISON WI 53719

Phone/Email: 6083350970 JIM@THEMVPINSURANCEAGENCY.COM

WI

# Agency Scorecard

## 1249148, MVP MOTORCYCLE INSURANCE AGENCY, LLC (THE)

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Motorcycle | $35,772 | 10.4% | 81.7% | $31,171 | 16.8% | $1,140 | -77.8% | 41 | 24.2% | 82.0% | $872 | 10/31/2025 |
| | Off-Road Veh | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$35,772** | **10.4%** | **81.7%** | **$31,171** | **16.8%** | **$1,140** | **-77.8%** | **41** | **24.2%** | **82.0%** | **$872** | |
| **Total** | **Total** | **$35,772** | **10.4%** | **81.7%** | **$31,171** | **16.8%** | **$1,140** | **-77.8%** | **41** | **24.2%** | **82.0%** | **$872** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Motorcycle | 56 | 17 | $13,618 | 50 | 16 | $13,350 | 0.32 | 5 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **58** | **17** | **$13,618** | **52** | **16** | **13,350** | **0.31** | **6** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **58** | **17** | **$13,618** | **52** | **16** | **13,350** | **0.31** | **6** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: SUB

LBE UPN:1079147

1079147

MVP MOTORCYCLE INSURANCE AGENCY, LLC (THE)

Address: 3223 N PONTIAC DR

JANESVILLE WI 53545

Phone/Email: 6083350970 JIM@THEMVPINSURANCEAGENCY.COM

WV

# Agency Scorecard

## 1277560, DARREN WHITTEN INS INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $5,447 | 37.0% | 5.7% | $5,447 | 37.0% | $0 | 0.0% | 5 | 25.0% | 100.0% | $1,089 | 10/31/2025 |
| | Home | $1,516 | 9999.9% | 10.6% | $1,516 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $1,516 | 10/31/2025 |
| | Marine | $1,323 | 1223.0% | 5.2% | $1,323 | 1223.0% | $0 | 0.0% | 1 | 0.0% | 50.0% | $1,323 | 10/31/2025 |
| | Mobile Home | $5,111 | 4.2% | 43.2% | $5,111 | 4.2% | $0 | 0.0% | 4 | 0.0% | 100.0% | $1,278 | 10/31/2025 |
| | Motorcycle | $0 | -100.0% | 0.0% | $0 | -100.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Off-Road Veh | $5,356 | 90.7% | 4.3% | $5,356 | 51.3% | $0 | 0.0% | 13 | 0.0% | 81.3% | $412 | 10/31/2025 |
| | Rental M.H. | $4,898 | 12.7% | 4.9% | $2,266 | 876.7% | $272 | 1.9% | 5 | 0.0% | 100.0% | $980 | 10/31/2025 |
| | Travel Trailer | $1,501 | -6.2% | 6.5% | $1,501 | -6.2% | $0 | 0.0% | 4 | 0.0% | 100.0% | $375 | 10/31/2025 |
| | **Total** | **$25,152** | **44.7%** | **14.0%** | **$22,520** | **60.8%** | **$272** | **1.9%** | **33** | **6.5%** | **89.2%** | **$762** | |
| **Total** | **Total** | **$25,152** | **44.7%** | **14.0%** | **$22,520** | **60.8%** | **$272** | **1.9%** | **33** | **6.5%** | **89.2%** | **$762** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | 4 | 1 | $1,182 | 3 | 1 | $1,182 | 0.33 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 1 | 1 | $1,516 | 1 | 1 | $1,516 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 2 | 1 | $1,323 | 2 | 1 | $1,323 | 0.50 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 3 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 5 | 0 | $0 | 5 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 4 | 3 | $3,235 | 4 | 3 | $3,235 | 0.75 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **19** | **6** | **$7,256** | **17** | **6** | **7,256** | **0.35** | **2** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **19** | **6** | **$7,256** | **17** | **6** | **7,256** | **0.35** | **2** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1277560

DARREN WHITTEN INS INC

Address: 844 COOK PKWY

OCEANA WV 24870

Phone/Email: 3046828789 WHITTEN.DARREN@YAHOO.COM

WV

# Agency Scorecard

## 1283327, JON PARRACK II

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $1,353 | 0.7% | 6.9% | $1,353 | 0.7% | $0 | 0.0% | 2 | 0.0% | 100.0% | $677 | 10/31/2025 |
| | Home | $2,496 | 84.3% | 5.6% | $2,496 | 84.3% | $868 | 9999.9% | 1 | 0.0% | 50.0% | $2,496 | 10/31/2025 |
| | Mobile Home | $25,445 | -10.8% | 15.1% | $23,097 | -10.9% | ($1,224) | -224.6% | 29 | -12.1% | 85.3% | $877 | 10/31/2025 |
| | Motor Home | $766 | -1.5% | 5.5% | $766 | -1.5% | $0 | 0.0% | 1 | 0.0% | 100.0% | $766 | 10/31/2025 |
| | Motorcycle | $280 | 0.7% | 2.2% | $280 | 0.7% | $0 | 0.0% | 1 | 0.0% | 100.0% | $280 | 10/31/2025 |
| | Rental M.H. | $7,281 | 11.0% | 5.6% | $6,218 | 12.3% | $0 | 0.0% | 7 | 0.0% | 100.0% | $1,040 | 10/31/2025 |
| | Travel Trailer | $666 | -43.6% | 3.4% | $612 | -54.2% | $268 | -1.8% | 4 | 0.0% | 80.0% | $167 | 10/31/2025 |
| | **Total** | **$38,287** | **-4.3%** | **12.3%** | **$34,822** | **-4.7%** | **($88)** | **-107.0%** | **45** | **-8.2%** | **86.5%** | **$851** | |
| **Total** | **Total** | **$38,287** | **-4.3%** | **12.3%** | **$34,822** | **-4.7%** | **($88)** | **-107.0%** | **45** | **-8.2%** | **86.5%** | **$851** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | 20 | 0 | $0 | 12 | 0 | $0 | 0.00 | 3 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 3 | 1 | $868 | 3 | 1 | $868 | 0.33 | 2 | 1 | $868 | 50.0% | 10/31/2025 |
| | Mobile Home | 7 | 1 | $265 | 7 | 1 | $265 | 0.14 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 3 | 0 | $0 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 1 | 1 | $199 | 1 | 1 | $199 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **35** | **3** | **$1,332** | **27** | **3** | **1,332** | **0.11** | **6** | **1** | **$868** | **16.7%** | |
| **Grand Total** | | **35** | **3** | **$1,332** | **27** | **3** | **1,332** | **0.11** | **6** | **1** | **$868** | **16.7%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Renata Johnson

Role: LBE

LBE UPN:1283327

JON PARRACK II

Address: 809 VIAND ST

POINT PLEASANT WV 25550

Phone/Email: 3046754132 JON@PIAWV.COM

WV

# Agency Scorecard

## 1283350, DEAN,MARK S

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$0** | **0.0%** | **0.0%** | **$0** | **0.0%** | **$0** | **0.0%** | **0** | **0.0%** | **0.0%** | **$0** | |
| Foremost Choice | Dwelling Fire | $24,314 | 12.6% | 9.9% | $21,925 | 23.4% | ($2,358) | -178.4% | 18 | 5.9% | 85.7% | $1,351 | 10/31/2025 |
| | Home | $7,554 | 388.3% | 4.7% | $7,554 | 388.3% | $0 | 0.0% | 4 | 100.0% | 100.0% | $1,889 | 10/31/2025 |
| | Marine | $750 | 7.6% | 6.5% | $750 | 7.6% | $0 | 0.0% | 3 | 0.0% | 100.0% | $250 | 10/31/2025 |
| | Mobile Home | $17,898 | 3.8% | 640.7% | $16,888 | 7.8% | $2,476 | -47.7% | 20 | 11.1% | 90.9% | $895 | 10/31/2025 |
| | Rental M.H. | $3,322 | 56.1% | 8.0% | $2,262 | 36.4% | $562 | 6.4% | 6 | 20.0% | 100.0% | $554 | 10/31/2025 |
| | Travel Trailer | $497 | -3.5% | 5.8% | $497 | -3.5% | $0 | 0.0% | 1 | 0.0% | 100.0% | $497 | 10/31/2025 |
| | **Total** | **$54,335** | **24.3%** | **232.1%** | **$49,876** | **31.8%** | **$680** | **-91.8%** | **52** | **13.0%** | **91.2%** | **$1,045** | |
| **Total** | **Total** | **$54,335** | **24.3%** | **232.1%** | **$49,876** | **31.8%** | **$680** | **-91.8%** | **52** | **13.0%** | **91.2%** | **$1,045** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bristol West Auto | Personal Auto | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| Foremost Choice | Dwelling Fire | 27 | 4 | $6,232 | 22 | 4 | $6,232 | 0.18 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 2 | 2 | $5,269 | 2 | 2 | $5,269 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 14 | 4 | $2,131 | 13 | 4 | $2,131 | 0.31 | 1 | 1 | $342 | 100.0% | 10/31/2025 |
| | Rental M.H. | 3 | 1 | $549 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **46** | **11** | **$14,181** | **40** | **10** | **13,632** | **0.25** | **1** | **1** | **$342** | **100.0%** | |
| **Grand Total** | | **46** | **11** | **$14,181** | **40** | **10** | **13,632** | **0.25** | **1** | **1** | **$342** | **100.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1283350

DEAN,MARK S

Address: 3604 36TH ST

NITRO WV 25143

Phone/Email: 3047550288 SHANNON@SHANNONDEANINSURANCE.COM

WV

# Agency Scorecard

## 1297629, MORTON-BURDETTE INSURANCE GROUP LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $24,313 | 46.0% | 9.5% | $19,478 | 51.6% | $1,939 | -336.2% | 18 | 28.6% | 81.8% | $1,351 | 10/31/2025 |
| | Home | $6,923 | -18.2% | 4.3% | $6,923 | -18.2% | $0 | 0.0% | 7 | 40.0% | 87.5% | $989 | 10/31/2025 |
| | Mobile Home | $32,287 | -12.3% | 28.1% | $25,417 | -7.2% | $0 | 0.0% | 28 | -9.7% | 84.8% | $1,153 | 10/31/2025 |
| | Motor Home | $942 | 9999.9% | 17.5% | $942 | 9999.9% | ($1,022) | 0.0% | 1 | 9999.9% | 50.0% | $942 | 10/31/2025 |
| | Motorcycle | $1,546 | -3.9% | 2.0% | $1,546 | -3.9% | $0 | 0.0% | 3 | 0.0% | 100.0% | $515 | 10/31/2025 |
| | Off-Road Veh | $413 | -15.7% | 2.0% | $150 | 0.0% | $75 | 0.0% | 4 | 0.0% | 100.0% | $103 | 10/31/2025 |
| | Rental M.H. | $6,508 | 2.1% | 5.7% | $6,824 | 18.8% | $675 | -26.6% | 11 | -21.4% | 68.8% | $592 | 10/31/2025 |
| | Travel Trailer | $1,780 | 210.1% | 11.1% | $1,780 | 82.2% | $0 | -100.0% | 4 | 100.0% | 100.0% | $445 | 10/31/2025 |
| | **Total** | **$74,712** | **5.3%** | **17.5%** | **$63,060** | **10.3%** | **$1,667** | **163.3%** | **76** | **4.1%** | **82.6%** | **$983** | |
| **Total** | **Total** | **$74,712** | **5.3%** | **17.5%** | **$63,060** | **10.3%** | **$1,667** | **163.3%** | **76** | **4.1%** | **82.6%** | **$983** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | 47 | 8 | $9,612 | 39 | 8 | $9,612 | 0.21 | 7 | 1 | $1,939 | 14.3% | 10/31/2025 |
| | Home | 11 | 3 | $2,716 | 11 | 3 | $2,716 | 0.27 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 16 | 2 | $2,162 | 12 | 2 | $2,162 | 0.17 | 2 | 1 | $960 | 50.0% | 10/31/2025 |
| | Motor Home | 4 | 2 | $1,964 | 4 | 2 | $1,964 | 0.50 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 8 | 2 | $2,143 | 7 | 2 | $2,143 | 0.29 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 2 | 2 | $883 | 2 | 2 | $883 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **90** | **19** | **$19,480** | **77** | **19** | **19,480** | **0.25** | **10** | **2** | **$2,899** | **20.0%** | |
| **Grand Total** | | **90** | **19** | **$19,480** | **77** | **19** | **19,480** | **0.25** | **10** | **2** | **$2,899** | **20.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1297629

MORTON-BURDETTE INSURANCE GROUP LLC

Address: 109 CHURCH ST N

RIPLEY WV 25271

Phone/Email: 3043737283 ELIZABETH@MBINSURANCEGROUP.COM

WV

# Agency Scorecard

## 1307612, EDWARDS INSURANCE AGENCY & FINANCIAL SERVICES, INC.

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Home | $1,262 | -79.5% | 6.7% | $3,606 | -41.3% | $0 | 0.0% | 2 | -33.3% | 50.0% | $631 | 10/31/2025 |
| | Mobile Home | $12,051 | -7.0% | 5.8% | $8,101 | -20.1% | ($142) | -115.4% | 12 | -14.3% | 85.7% | $1,004 | 10/31/2025 |
| | Rental M.H. | $406 | 8.8% | 6.1% | $406 | 8.8% | $0 | 0.0% | 1 | 0.0% | 100.0% | $406 | 10/31/2025 |
| | Travel Trailer | $257 | 135.8% | 5.7% | $257 | -2.7% | $0 | 0.0% | 1 | 0.0% | 100.0% | $257 | 10/31/2025 |
| | **Total** | **$13,976** | **-28.7%** | **6.0%** | **$12,370** | **-26.9%** | **($142)** | **-115.4%** | **16** | **-15.8%** | **80.0%** | **$874** | |
| **Total** | **Total** | **$13,976** | **-28.7%** | **6.0%** | **$12,370** | **-26.9%** | **($142)** | **-115.4%** | **16** | **-15.8%** | **80.0%** | **$874** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | 3 | 0 | $0 | 3 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 4 | 1 | $800 | 3 | 1 | $800 | 0.33 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 5 | 0 | $0 | 5 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **12** | **1** | **$800** | **11** | **1** | **800** | **0.09** | **1** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **12** | **1** | **$800** | **11** | **1** | **800** | **0.09** | **1** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1307612

EDWARDS INSURANCE AGENCY & FINANCIAL SERVICES, INC.

Address: 16239 NORTHWESTERN PIKE

AUGUSTA WV 26704

Phone/Email: 3044968760 REBECCA@EDWARDSINSCO.COM

WV

# Agency Scorecard

## 1307616, HOTT,REBECCA EDWARDS

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Travel Trailer | $1,435 | 3.5% | 12.0% | $1,435 | 3.5% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,435 | 10/31/2025 |
| | **Total** | **$1,435** | **3.5%** | **12.0%** | **$1,435** | **3.5%** | **$0** | **0.0%** | **1** | **0.0%** | **100.0%** | **$1,435** | |
| **Total** | **Total** | **$1,435** | **3.5%** | **12.0%** | **$1,435** | **3.5%** | **$0** | **0.0%** | **1** | **0.0%** | **100.0%** | **$1,435** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: SUB

LBE UPN:1307612

1307612

HOTT,REBECCA EDWARDS

Address: 16239 NORTHWESTERN PIKE

AUGUSTA WV 26704

Phone/Email: 3044968760 REBECCA@EDWARDSINSCO.COM

WV

# Agency Scorecard

## 1317586, COURTNEY L COOPER AGENCY INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $7,857 | -8.1% | 6.6% | $6,581 | -10.7% | $0 | -100.0% | 6 | 0.0% | 85.7% | $1,310 | 10/31/2025 |
| | Mobile Home | $902 | 2.0% | 4.2% | $902 | 2.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $902 | 10/31/2025 |
| | Motor Home | $623 | 0.0% | 5.8% | $623 | 0.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $623 | 10/31/2025 |
| | Motorcycle | $1,111 | 157.8% | 5.9% | $1,111 | 157.8% | $216 | 9999.9% | 3 | 200.0% | 100.0% | $370 | 10/31/2025 |
| | Off-Road Veh | $196 | 63.3% | 3.9% | $196 | 63.3% | $0 | 0.0% | 1 | 0.0% | 50.0% | $196 | 10/31/2025 |
| | Rental M.H. | $1,909 | 24.5% | 5.8% | $1,909 | 24.5% | $0 | 0.0% | 3 | 0.0% | 100.0% | $636 | 10/31/2025 |
| | Travel Trailer | $133 | 0.8% | 5.4% | $133 | 0.8% | $0 | 0.0% | 1 | 0.0% | 100.0% | $133 | 10/31/2025 |
| | **Total** | **$12,731** | **3.8%** | **6.2%** | **$11,455** | **3.3%** | **$216** | **-91.5%** | **16** | **14.3%** | **88.9%** | **$796** | |
| **Total** | **Total** | **$12,731** | **3.8%** | **6.2%** | **$11,455** | **3.3%** | **$216** | **-91.5%** | **16** | **14.3%** | **88.9%** | **$796** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | 7 | 1 | $1,450 | 6 | 1 | $1,450 | 0.17 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 1 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 3 | 2 | $680 | 3 | 2 | $680 | 0.67 | 1 | 1 | $216 | 100.0% | 10/31/2025 |
| | Off-Road Veh | 1 | 1 | $196 | 1 | 1 | $196 | 1.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **14** | **4** | **$2,326** | **12** | **4** | **2,326** | **0.33** | **1** | **1** | **$216** | **100.0%** | |
| **Grand Total** | | **14** | **4** | **$2,326** | **12** | **4** | **2,326** | **0.33** | **1** | **1** | **$216** | **100.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1317586

COURTNEY L COOPER AGENCY INC

Address: 8048 LYNN AVE

HAMLIN WV 25523

Phone/Email: 3048245300 COURTNEY@SAVEINSURANCEGROUP.COM

WV

# Agency Scorecard

## 1327069, CALL,MARK DARREN

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Home | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Marine | $551 | 572.0% | 5.6% | $551 | 572.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $551 | 10/31/2025 |
| | Mobile Home | $1,829 | -345.2% | 4.4% | $478 | -183.3% | $0 | 0.0% | 2 | 100.0% | 100.0% | $915 | 10/31/2025 |
| | Motorcycle | ($942) | -178.0% | -103.1% | $0 | -100.0% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | Off-Road Veh | $1,067 | 157.7% | 8.2% | $1,067 | 157.7% | $718 | 9999.9% | 1 | 0.0% | 50.0% | $1,067 | 10/31/2025 |
| | Rental M.H. | $2,315 | 4.1% | 6.8% | $1,447 | 6.8% | $498 | 2.5% | 4 | 0.0% | 100.0% | $579 | 10/31/2025 |
| | Travel Trailer | $490 | -36.4% | 5.3% | $681 | -11.6% | $0 | 0.0% | 2 | 0.0% | 66.7% | $245 | 10/31/2025 |
| | **Total** | **$5,310** | **34.4%** | **4.2%** | **$4,224** | **29.8%** | **$1,216** | **150.2%** | **10** | **-9.1%** | **71.4%** | **$531** | |
| **Total** | **Total** | **$5,310** | **34.4%** | **4.2%** | **$4,224** | **29.8%** | **$1,216** | **150.2%** | **10** | **-9.1%** | **71.4%** | **$531** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | 3 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Home | 2 | 0 | $0 | 2 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Marine | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 1 | 1 | $478 | 1 | 0 | $0 | 0.00 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 3 | 1 | $885 | 3 | 1 | $885 | 0.33 | 1 | 1 | $885 | 100.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 1 | 1 | $315 | 0 | 1 | $315 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **11** | **3** | **$1,678** | **9** | **2** | **1,200** | **0.22** | **2** | **1** | **$885** | **50.0%** | |
| **Grand Total** | | **11** | **3** | **$1,678** | **9** | **2** | **1,200** | **0.22** | **2** | **1** | **$885** | **50.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Renata Johnson

Role: LBE

LBE UPN:1327069

CALL,MARK DARREN

Address: 708 CENTRAL AVE

BARBOURSVILLE WV 25504

Phone/Email: 3047366090 MARK@MARKCALLINSURANCE.COM

# Agency Scorecard

**WV**

## 1358104, KIRTLEY INSURANCE SERVICES, INC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Mobile Home | $7,038 | 15.6% | 5.8% | $5,987 | 18.1% | ($199) | 0.0% | 4 | -20.0% | 80.0% | $1,760 | 10/31/2025 |
| | Rental M.H. | $124 | -27.9% | -4.6% | $0 | -100.0% | $0 | 0.0% | 1 | 0.0% | 100.0% | $124 | 10/31/2025 |
| | **Total** | **$7,162** | **14.4%** | **5.7%** | **$5,987** | **14.2%** | **($199)** | **0.0%** | **5** | **-16.7%** | **83.3%** | **$1,432** | |
| **Total** | **Total** | **$7,162** | **14.4%** | **5.7%** | **$5,987** | **14.2%** | **($199)** | **0.0%** | **5** | **-16.7%** | **83.3%** | **$1,432** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **0** | **0** | **$0** | **0** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1358104

KIRTLEY INSURANCE SERVICES, INC

Address: 310 HURRICANE CREEK RD

HURRICANE WV 25526

Phone/Email: 3045629226 MIKE@KIRTLEYINSURANCE.COM

WV

# Agency Scorecard

## 1358132, JODY COOK INSURANCE AGENCY, INC.

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Marine | $0 | 0.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Mobile Home | $1,092 | 3.4% | 6.1% | $1,092 | 3.4% | $0 | 0.0% | 1 | 0.0% | 100.0% | $1,092 | 10/31/2025 |
| | Motorcycle | $0 | -100.0% | 0.0% | $0 | 0.0% | $0 | 0.0% | 0 | 0.0% | 0.0% | $0 | 10/31/2025 |
| | Off-Road Veh | $437 | -3.1% | 1.6% | $362 | -3.7% | $0 | 0.0% | 2 | 0.0% | 100.0% | $219 | 10/31/2025 |
| | **Total** | **$1,529** | **19.5%** | **4.2%** | **$1,454** | **1.5%** | **$0** | **0.0%** | **3** | **0.0%** | **100.0%** | **$510** | |
| **Total** | **Total** | **$1,529** | **19.5%** | **4.2%** | **$1,454** | **1.5%** | **$0** | **0.0%** | **3** | **0.0%** | **100.0%** | **$510** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Marine | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motorcycle | 1 | 0 | $0 | 1 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Off-Road Veh | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **2** | **0** | **$0** | **2** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |
| **Grand Total** | | **2** | **0** | **$0** | **2** | **0** | **0** | **0.00** | **0** | **0** | **$0** | **0.0%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1358132

JODY COOK INSURANCE AGENCY, INC.

Address: 2135 APPALACHIAN HIGHWAY

PINEVILLE WV 24874

Phone/Email: 3047326261 JODYCOOK.JCI@GMAIL.COM

WV

# Agency Scorecard

## 1385258, PARRACK INSURANCE AGENCY LLC

Most up-to-date IBU Report for Business Units: SPEC, FSAH, AUTO, FACT, FAR

| LOB | Policy Type | R12 NWP | R12 % Chg. | R4Q Loss Ratio | YTD NWP | YTD % Chg. | Cur Mo NWP | Cur Mo %Chg | PIF | PIF % Chg. | PIF Ret Ratio | Annual Avg Prem | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | $4,640 | 50.3% | 6.0% | $4,623 | 49.8% | $859 | 9999.9% | 6 | 100.0% | 75.0% | $773 | 10/31/2025 |
| | Home | $1,222 | 9999.9% | 10.8% | $1,222 | 9999.9% | $0 | 0.0% | 1 | 9999.9% | 100.0% | $1,222 | 10/31/2025 |
| | Mobile Home | $19,502 | -4.0% | 41.7% | $14,557 | -6.1% | $1,860 | -47.8% | 20 | 0.0% | 83.3% | $975 | 10/31/2025 |
| | Motor Home | $706 | 0.6% | 6.0% | $706 | 0.6% | $0 | 0.0% | 1 | 0.0% | 100.0% | $706 | 10/31/2025 |
| | Rental M.H. | $7,367 | -8.5% | 9.3% | $7,073 | 3.1% | $0 | 0.0% | 8 | 0.0% | 72.7% | $921 | 10/31/2025 |
| | Travel Trailer | $1,518 | -15.8% | 7.0% | $1,518 | -15.8% | $0 | 0.0% | 0 | -100.0% | 0.0% | $0 | 10/31/2025 |
| | **Total** | **$34,955** | **3.0%** | **27.4%** | **$29,699** | **6.2%** | **$2,719** | **-23.7%** | **36** | **9.1%** | **78.3%** | **$971** | |
| **Total** | **Total** | **$34,955** | **3.0%** | **27.4%** | **$29,699** | **6.2%** | **$2,719** | **-23.7%** | **36** | **9.1%** | **78.3%** | **$971** | |

| LOB | Policy Type | R12 Quotes | R12 New Pols | R12 New Prem | YTD Quotes | YTD New Pols | YTD New Prem | YTD Close Rate | Cur Mo Quotes | Cur Mo New Pols | Cur Mo New Prem | Cur Mo Close Rate | Month End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Foremost Choice | Dwelling Fire | 16 | 5 | $5,337 | 14 | 4 | $3,915 | 0.29 | 2 | 1 | $859 | 50.0% | 10/31/2025 |
| | Home | 2 | 1 | $1,222 | 2 | 1 | $1,222 | 0.50 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Mobile Home | 15 | 4 | $3,976 | 12 | 3 | $2,965 | 0.25 | 1 | 0 | $0 | 0.0% | 10/31/2025 |
| | Motor Home | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Rental M.H. | 5 | 3 | $1,379 | 5 | 3 | $1,379 | 0.60 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | Travel Trailer | 0 | 0 | $0 | 0 | 0 | $0 | 0.00 | 0 | 0 | $0 | 0.0% | 10/31/2025 |
| | **Total** | **38** | **13** | **$11,914** | **33** | **11** | **9,481** | **0.33** | **3** | **1** | **$859** | **33.3%** | |
| **Grand Total** | | **38** | **13** | **$11,914** | **33** | **11** | **9,481** | **0.33** | **3** | **1** | **$859** | **33.3%** | |

Cur Mo Close Rate = (Cur New Policies / Curr Mo Qtes) * 100 Portfolio Owner

YTD Close Rate = (YTD New Policies / YTD Qtes) * 100

PIF Retention Ratio = (PIF / (Last Yr PIF + R12 New Policies)) *100

Annual Average Premium = This Yr R12 NWP / PIF

Portfolio Owner: Digital Segment

Role: LBE

LBE UPN:1385258

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