



# New Program Assessment

Liberty Mutual Insurance is a leader in the specialty program market and our GRS North America Programs unit works with best in class Program Administrators and distribution partners. Please complete the new program assessment to start the conversation and our initial review. Thank you for your interest in working with us!

## A. General Information

Program Administrator Name:

Program Contact Name:

Telephone:

E-mail:

Address:

Website Address:

Program Administrator Description:

*If Intermediary involved, please fill out the below:*

Intermediary Name:

Intermediary Contact Name:

Intermediary Telephone:

Intermediary E-mail:

## B. Program Information

Program Name:

Niche/Business Targeted:

Program Existing or Startup:

Year established (if existing program):

Geography: National / Regional / Explain:



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## C. Program Details

Program Distribution (Select all that Apply):

- a. Open
- b. Retail Agents
- c. Wholesale
- d. Direct / Closed

Program Forms (Select all that Apply):

- a. Proprietary
- b. Standard (ISO, AAIS)
- c. Admitted
- d. Non-admitted
- e. Both admitted & non-admitted

Delegated Underwriting Authority (Select One):

Yes  No

Claims Handling (Select One):

- a. PA
- b. Carrier
- c. TPA

Name of TPA:

Program Coverage (Lines of Business that are Offered):

Key Class or SIC Codes:

Structure (Select all that Apply):

- a. Traditional
- b. Front
- c. Captive
- d. RRG
- e. Binding
- f. Subscription

Do you prefer to use a carrier or PA system for quote, bind and issue?



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## D. Program Results

<u>YEAR</u>	<u>WRITTEN PREMIUM</u>	<u>EARNED PREMIUM</u>	<u>LOSS RATIO</u>
Last	\$ _____	\$ _____	
2 <sup>nd</sup>	\$ _____	\$ _____	
3 <sup>rd</sup>	\$ _____	\$ _____	
4 <sup>th</sup>	\$ _____	\$ _____	
5 <sup>th</sup>	\$ _____	\$ _____	

Estimated Loss ratio \_\_\_\_\_

5 Years of Loss Data Available Yes  No

Rate Trend Last 3 Years:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

Ultimate universe of potential GWP (If, known) \_\_\_\_\_

## E. Miscellaneous

Why is Program being Marketed:

Differentiators, Program Endorsements or Affiliations:

Desired Launch Date:

Other: