M. J. Hall & Company, Inc.

Please fax your completed producer appointment package to your broker or branch office of choice. Your packet must include the following documents:

- Producer/Broker Questionnaire/Application form
- Brokerage Agreement form
- A copy of your current E&O declaration page
- A copy of your current license
- IRS Form W-9

Corporate Office & Stockton Branch
P.O. Box 192
Stockton, CA 95201
Ph (209) 948-8108 x101
Fx (209) 465-3843
Norm Amick, EVP/Branch Manager
norm@mjhallandcompany.com
Ph (209) 948-8108 x284
Fx (209) 870-2955
Angela Karim, Marketing Representative
angela@mjhallandcompany.com

San Francisco
1 Sutter Street, Suite 1000
San Francisco, CA 94104
Ph (415) 848-8220 x551
Fx (415) 848-8235
Frank Cravens, VP/Branch Manager
fcravens@mjhallandcompany.com

Alaska - M.J. Hall & Company of Alaska, Inc.
2101 West 48th Avenue, Suite B
Anchorage, AK 99517
Ph (907) 929-5822
Fx (888) 663-8855
Suzy Baird, AVP/Branch Manager
suzy@mjhallandcompany.com

Nevada(Stockton Satellite)
344 Monte Cristo Drive
Dayton, Nevada 89403
Ph (775) 246-3223
Fx (775)246-4915
Pamela Lewis,Broker/SR Underwriter
Pamela@mjhallandcompany.com

Arizona
8687 E. Via de Ventura, #214
Scottsdale, AZ 85258
Ph (480) 367-0103
Fx (866) 212-8199
Bill Frazer, Broker
bill@mjhallandcompany.com

Texas
2121 W. Spring Creek Parkway, Suite 111
Plano, TX 75023
Ph (972) 208-1016
Fx (972) 208-8694
Brett Amick, VP/Branch Manager
bretta@mjhallandcompany.com

Napa
1700 Soscol Avenue, Suite 5
Napa, CA 94559
Ph (707) 226-5354
Fx (707) 226-5338
Suzie J. Hall Reynolds, VP/Branch Manager
suzie@mjhallandcompany.com

Woodland Hills
5950 Canoga Avenue Suite 530
Woodland Hills, CA 91367
Ph (818) 888-9828
Fx (800) 465-6577
John Stawecki, VP/Branch Manager
john.stawecki@mjhallandcompany.com

M.J. Hall & Company, Inc.

PRODUCER/BROKER QUESTIONNAIRE/APPLICATION

Name of Applicant:	
DBA Name:	
Mailing Address:	
City/State/Zip:	
Location Address:	
City/State/Zip:	

Applicant is:	☐ Individual ☐ Partnership ☐ Corporation ☐ LLC
Contact Person:	
Contact Person E-Mail Address:	
Web Site:	

Telephone Number:		Fax Number:	

Date Established:		Federal Tax I. D. No.	

List of Principals or Officers:

Attach separate list if needed to complete list.

Name of Bank for Trust Account:	
Trust Account Number:	
Street Address of Bank:	
City/State/Zip of Bank:	

List Major Carriers you directly deal with:

List Wholesalers you normally deal with:

AAMGA

Home Office: 709 North Center Street □ P.O. Box 192, Stockton, CA 95201-0192
Telephone: (209) 948-8108 □ Fax: (209) 465-3843 □ License #0488901

M.J. Hall & Company, Inc.

PRODUCER/BROKER QUESTIONNAIRE/APPLICATION

Provide Approximate Mix of Business:

Commercial Lines Business:	$	**Personal Lines Business:**	$
Placed with Wholesalers:	%	**Placed with Wholesalers:**	%

Do you carry Errors & Omissions Insurance? ☐ Yes ☐ No
(Minimum limits of $1,000,000 are required to transact business with MJ Hall)

Have you previously been appointed by M.J. Hall & Co. as a producer? ☐ Yes ☐ No
If yes, explain:

Please list names of your producers who might be placing business with us:

If there is a specific MJ Hall office and/or person you wish to utilize the please list below:

MJH Office:	**MJH Broker/Underwriter:**

If you have multiple locations then complete a separate form (pertinent information) for each location.

Have you, or any owner or officer of your agency, in the past 5 years been the subject of disciplinary action by any state Department of Insurance, or other regulatory agency? ☐ Yes ☐ No
If Yes, explain:

In addition to this form we also require the following:

- **Signed and dated MJ Hall Brokerage Agreement (signed by officer or owner).**
- **Copy of Dec page for E&O (or certificate issued by market).**
- **Copy of applicable P/C license(s).**
- **Completed W-9.**

_______________________ (Print or Type Name) _______________________ (Date)

_______________________ (Signature) _______________________ (Title)

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ciwa

Form **W-9**
(Rev. September 2007)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer Identification Number and Certification

Give form to the requester. Do not send to the IRS.

Print or type
See Specific Instructions on page 2.

Name (as shown on your income tax return)

Business name, if different from above

Check appropriate box: ☐ Individual/Sole proprietor ☐ Corporation ☐ Partnership
☐ Limited liability company. Enter the tax classification (D=disregarded entity, C=corporation, P=partnership) ▶ ....
☐ Other (see instructions) ▶

☐ Exempt payee

Address (number, street, and apt. or suite no.)

Requester's name and address (optional)

City, state, and ZIP code

List account number(s) here (optional)

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on Line 1 to avoid backup withholding. For individuals, this is your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

Note. If the account is in more than one name, see the chart on page 4 for guidelines on whose number to enter.

Social security number

or

Employer identification number

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
3. I am a U.S. citizen or other U.S. person (defined below).

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the Certification, but you must provide your correct TIN. See the instructions on page 4.

Sign Here Signature of U.S. person ▶ Date ▶

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Purpose of Form

A person who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) to report, for example, income paid to you, real estate transactions, mortgage interest you paid, acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA.

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN to the person requesting it (the requester) and, when applicable, to:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),

2. Certify that you are not subject to backup withholding, or

3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income.

Note. If a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

Definition of a U.S. person. For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien,
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States,
- An estate (other than a foreign estate), or
- A domestic trust (as defined in Regulations section 301.7701-7).

Special rules for partnerships. Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax on any foreign partners' share of income from such business. Further, in certain cases where a Form W-9 has not been received, a partnership is required to presume that a partner is a foreign person, and pay the withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid withholding on your share of partnership income.

The person who gives Form W-9 to the partnership for purposes of establishing its U.S. status and avoiding withholding on its allocable share of net income from the partnership conducting a trade or business in the United States is in the following cases:

- The U.S. owner of a disregarded entity and not the entity,