

Agent Loan Application/Underwriting Checklist

Below are the documents needed to apply for a loan.

New Agents to Allstate – Purchase:

- Signed Loan Application*
- Exhibit A of Loan Application – Financial Statement*
- Exhibit B of Loan Application – Agent Profile on Selling Agent*
- Exhibit C of Loan Application – Guarantor Questionnaire (if applicable)*
- Last 3 years **applicant's** Federal Income Tax Returns (Both Individual and Corporate, if applicable)
- Last 2 years agency profit and loss statements (if an agent with another insurance company prior to coming to Allstate)
- Last 3 years **selling agency** business tax returns
- Last 3 December **selling agency** CSRPs reports
- Current Resume

Existing Agents with Allstate – Purchase:**

- Signed Loan Application*
- Exhibit A of Loan Application – Financial Statement*
- Exhibit B of Loan Application – Agent Profile on Selling Agent*
- Exhibit C of Loan Application – Guarantor Questionnaire (if applicable)*
- Last 3 years **applicant's** Federal Income Tax Returns (Both Individual and Corporate, if applicable)
- Current YTD **applicant agency** profit and loss statements (agent prepared)
- Last 3 years **selling agency** business tax returns
- Last 3 December **applicant and selling** agency CSRPs reports

Existing Agents with Allstate – Refinance or Working Capital:

- Signed Loan Application*
- Exhibit A of Loan Application – Financial Statement*
- Exhibit C of Loan Application – Guarantor Questionnaire (if applicable)*
- Last 3 years **applicant's** Federal Income Tax Returns (Both Individual and Corporate, if applicable)
- Current YTD **applicant agency** profit and loss statements (agent prepared)
- Last 3 December **applicant agency** CSRPs reports

Please mail these documents, along with your application fee of \$500 (check made payable to Allstate Bank) to:

Agent loan Underwriting
 C/O Allstate Bank
 P.O. Box 3000
 Northbrook, IL 60065-3000
 Agent Lending Fax Number: 877-336-1158

or via overnight mail:

Agent loan Underwriting
 C/O Allstate Bank
 3100 Sanders Road, Suite N4A
 Northbrook, IL 60062
 847-402-8429

* Forms provided

**Agents considering the purchase of an existing insurance agency are encouraged to consult with their attorney to ensure the purchasing agent is adequately protected by an appropriate non-competition agreement from the selling agent.

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