



EVOLUTION
AGENCY MANAGEMENT, LLC

Agency

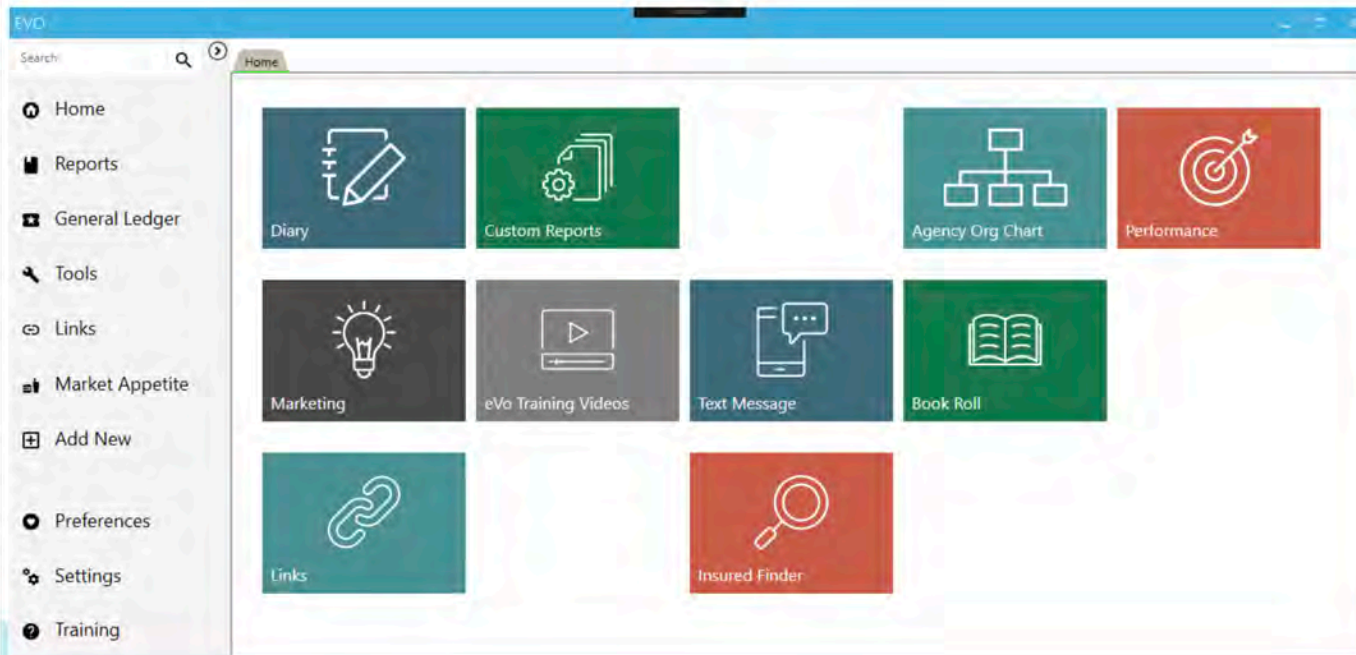
lforester

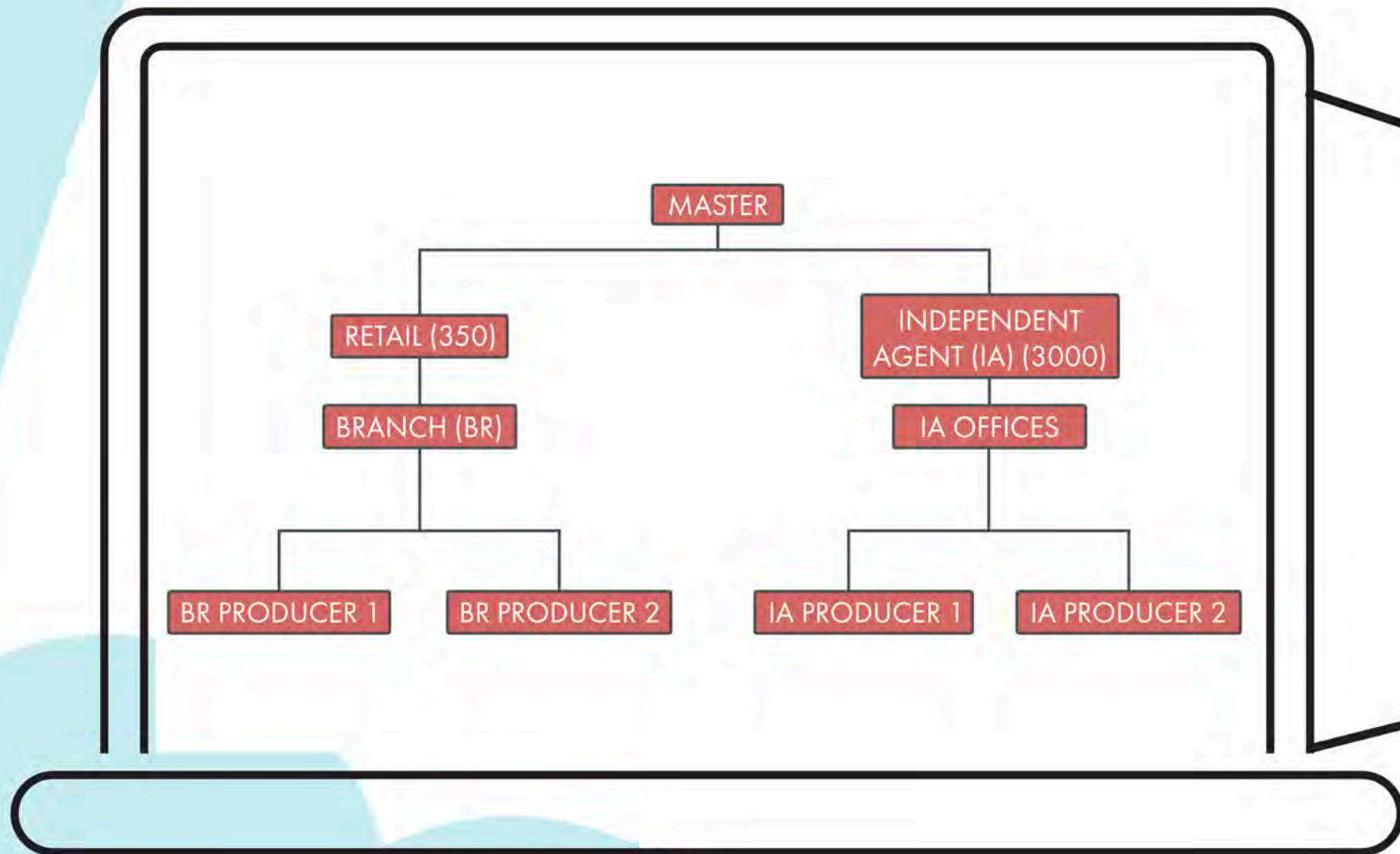
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 Security for ✕

Basic View/Edit ☐ Edit Insureds ☐ View Users ☐ Edit Users ☐ View Other Diary	Financial ☐ Run A/R Reports ☐ Accounting ☐ Main Office Invoicing ☐ Agent Invoicing ☐ Close Commissions ☐ Financial Reporting	Management ☐ Can See all Clients ☐ Run Mass Expirations ☐ Print Binders, Certs, ID's ☐ Allow Merge ☐ Trash a Diary ☐ Merge Diaries ☐ Diary View Assignments
Policies ☐ View Commissions ☐ Change Producers ☐ View Commission Splits	Companies ☐ View Companies ☐ Edit Companies ☐ View Company Diary	Administrative ☐ Administrator ☐ Database Query ☐ Set User Preferences
Reporting ☐ Run Policy Reports ☐ Run Diary Reports ☐ Run Custom Reports	Agencies ☐ View Agencies ☐ Edit Agencies ☐ Add New Agencies	eVoClient Default
		Ext Viewer Default

Find Insured

Name Address City Phone

OK Close

	Name	Address	City	Phone	Agency	Agency Phone
▶	Jones, Angel	1302 Brockhampton	Houston	(832) 555-8149	BR121-Gerardo Cummings	(713) 589-4785
	Jones, Dale	1307 Terrence Run Ln	Houston	(832) 555-5471	BR121-Gerardo Cummings	(713) 589-4785
	Jones, Donald	1308 Winding Trace Dr	Houston	(832) 555-8600	BR133-Lindsay Cross	(713) 867-5309
	Jones, Edgar	1310 Chiselhurst Way Ct	Houston	(832)-258-9547	BR098-Malcolm Dawson	(281) 895-7700

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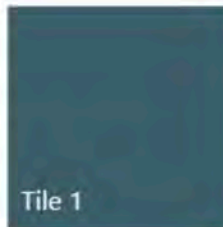
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Segoe UI

Home Search Richard "Gordy" & Michelle Bunch

Edit Templates Quoting Certificates

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1 of 1

Name Richard "Gordy" & Michelle Bunch Address 39 Legato Way E-Mail rgordy@twfg.com

Alpha Bunch III, Richard "Gordy" & Michelle City The Woodlands Agency BR000-Gordy Bunch

Salutation Dear Richard "Gordy" & Michelle State Virginia Producer 1 GB - Lock, Betty (BR000) - (201) 468-1198

Phone 1 (713) 419-0799 Call Home Zip 77382 TWFG

Phone 2 (281) 262-7656 Home Source Producer 2

Phone 3 (281) 419-0973 Business Referral County CSR

Phone 4 (713) 306-2756 Client Prop. Comm. Pay

Diary History Accounting Contacts Policies More... User Notes Attachments Claims

Priority	Date Due	Assigned To	Activity Type	Subject	Policy	Line	Company	Status	Date Entered	Rate/Change/Premium
	01/22/2019	CSR Work Group	Renewal	Renewal Reminder	001115673	Personal Automobile	AIG Private Client	O	11/7/2018	\$0.00
	9/15/2019	CSR Work Group	Renewal	Renewal Reminder	001498277	Personal Liability	AIG Private Client	O	9/6/2018	\$0.00
	8/15/2019	CSR Work Group	Renewal	Renewal Reminder	0011156673	Personal Automobile	AIG Private Client	O	9/6/2018	\$0.00
	5/3/2019	GB - Lock, Betty (BR000)	Renewal	Renewal Reminder	35827118	Watercraft (small boat)	Progressiv	O	4/25/2018	\$0.00
	3/24/2019	CSR Work Group	Renewal	Renewal Reminder	TFL00000126	Flood	TWFG - Hiscox Flood	O	5/22/2018	\$0.00
	3/24/2019	CSR Work Group	Renewal	Renewal Reminder	TFL00000126	Flood	TWFG - Hiscox Flood	O	4/23/2018	\$0.00
	1/23/2019	Forster, Lisa (rli)	ACORD Form	126.XFDL	HO 0007711765	Other	AIG Private Client	O	1/23/2019 9:45 AM	\$0.00
	1/23/2019	Forster, Lisa (rli)	ACORD Form	137_TX.XFDL	HO 0007711765	Other	AIG Private Client	O	1/23/2019 9:42 AM	\$0.00
	1/23/2019	Forster, Lisa (rli)	ACORD Form	137_TX.XFDL	HO 0007711765	Other	AIG Private Client	O	1/23/2019 9:41 AM	\$0.00
	1/21/2019	Forster, Lisa (rli)	ACORD Form	125.XFDL	35827118	Watercraft (small boat)	Progressiv	O	1/21/2019 12:14 PM	\$0.00
	1/21/2019	Forster, Lisa (rli)	ACORD Form	125.XFDL	0006078320	Inland Marine (personal lines)	AIG Private Client	O	1/21/2019 1:53 AM	\$0.00
	1/14/2019 1:57 PM	GB - Lock, Betty (BR000)	ToDo	Mobile App Service Request	PCG0042855593	Homeowners	AIG Private Client	O	1/15/2019 1:57 PM	\$0.00
	1/10/2019	Forster, Lisa (rli)	ToDo	The is a sticky note				O	1/10/2019 1:49 PM	\$0.00
	11/22/2018	GB - Lock, Betty (BR000)	Renewal	Renewal time	PCG0042855593	Homeowners	AIG Private Client	O	11/22/2018 8:05 AM	\$0.00
	11/20/2018 10:42 AM	GB - Lock, Betty (BR000)	ToDo	Mobile App Service Request	PCG0042855593	Homeowners	AIG Private Client	O	11/21/2018 10:42 AM	\$0.00
	11/20/2018 10:42 AM	GB - Bunch, Gordy (TWFG)	ToDo	Mobile App Service Request	0006078320	Inland Marine (personal lines)	AIG Private Client	O	11/21/2018 10:42 AM	\$0.00
	11/14/2018	CSR Work Group	Dec page	Verify Dec Page	0011156673	Personal Automobile	AIG Private Client	O	11/7/2018	\$0.00
	11/14/2018	CSR Work Group	Dec page	Verify Dec Page	0011156673	Personal Automobile	AIG Private Client	O	9/6/2018	\$0.00
	11/14/2018	CSR Work Group	Dec page	Verify Dec Page	001498277	Personal Liability	AIG Private Client	O	9/6/2018	\$0.00
	10/31/2018	GB - Lock, Betty (BR000)	Renewal	Renewal Reminder	PCG0007711765	Homeowners	AIG Private Client	O	11/8/2017	\$0.00

Home Search Richard "Gordy" & Michelle Bunch

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1 of 1

Active Inactive Trash

Name Richard "Gordy" & Michelle Bunch Address 39 Legato Way E-Mail gordy@twfg.com

Alpha Bunch III, Richard "Gordy" & Michelle Agency BR000-Gordy Bunch

Salutation Dear Richard "Gordy" & Michelle City The Woodlands Producer 1 GB - Loick, Betty (BR000) - (281) 466-1166

Phone 1 (713) 416-0789 Cell State Virginia TWFG

Phone 2 (281) 292-7656 Home Zip 77382 Producer 2

Phone 3 (281) 419-0973 Home Source CSR

Phone 4 (713) 306-2756 Business Referral County

Client Prosp. Comm Pers

Diary History Accounting Contacts Policies More... User Notes Attachments Claims

Priority	DateDue	Assigned To	Activity Type	Subject	Policy	Line	Company	Status	DateEntered	NetChangePremium
0	9/15/2019	CSR Work Group	Renewal	Renewal Reminder	0011156673	Personal Automobile	AIG Private Client	O	11/7/2018	\$0.00
	9/15/2019	CSR Work Group	Renewal	Renewal Reminder	0014992777	Personal Liability	AIG Private Client	O	9/6/2018	\$0.00
	9/15/2019	CSR Work Group	Renewal	Renewal Reminder	0011156673	Personal Automobile	AIG Private Client	O	9/6/2018	\$0.00
	5/3/2019	GB - Loick, Betty (BR000)	Renewal	Renewal Reminder	35827118	Watercraft (small boat)	Progressiv	O	4/25/2018	
	3/24/2019	CSR Work Group	Renewal	Renewal Reminder	TFL00000126	Flood	TWFG - Hiscox Flood	O	5/22/2018	\$0.00
	3/24/2019	CSR Work Group	Renewal	Renewal Reminder	TFL00000126	Flood	TWFG - Hiscox Flood	O	4/23/2018	
	1/23/2019	Forster, Lisa (eVo)	ACORD Form	126.XFDL	HO 0007711765	Other	AIG Private Client	O	1/23/2019 9:45 AM	\$0.00
	1/23/2019	Forster, Lisa (eVo)	ACORD Form	137_TXXFDL	HO 0007711765	Other	AIG Private Client	O	1/23/2019 9:42 AM	\$0.00
	1/23/2019	Forster, Lisa (eVo)	ACORD Form	137_TXXFDL	HO 0007711765	Other	AIG Private Client	O	1/23/2019 9:41 AM	\$0.00
	1/21/2019	Forster, Lisa (eVo)	ACORD Form	125.XFDL	35827118	Watercraft (small boat)	Progressiv	O	1/21/2019 12:14 PM	\$0.00
	1/21/2019	Forster, Lisa (eVo)	ACORD Form	125.XFDL	0006078320	Inland Marine (personal lines)	AIG Private Client	O	1/21/2019 10:53 AM	\$0.00
	1/14/2019 1:57 PM	GB - Loick, Betty (BR000)	ToDo	Mobile App Service Request	PCG0042855593	Homeowners	AIG Private Client	O	1/15/2019 1:57 PM	\$0.00
	1/10/2019	Forster, Lisa (eVo)	ToDo	The is a sticky note				O	1/10/2019 1:49 PM	\$0.00
	11/22/2018	GB - Loick, Betty (BR000)	Renewal	Renewal time	PCG0042855593	Homeowners	AIG Private Client	O	11/22/2017 8:05 AM	\$0.00
	11/20/2018 10:42 AM	GB - Loick, Betty (BR000)	ToDo	Mobile App Service Request	PCG0042855593	Homeowners	AIG Private Client	O	11/21/2018 10:42 AM	\$0.00
	11/20/2018 10:43 AM	GB - Bunch, Gordy (BR000)	ToDo	Mobile App Service Request	0006078320	Inland Marine (personal lines)	AIG Private Client	O	11/21/2018 10:43 AM	\$0.00

Home Search Richard "Gordy" & Michelle Bunch

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1 of 1

Active Inactive Trash

Name Richard "Gordy" & Michelle Bunch Address 39 Legato Way E-Mail gordy@twfg.com Email

Alpha Bunch III, Richard "Gordy" & Michelle Agency BR000-Gordy Bunch

Salutation Dear Richard "Gordy" & Michelle City The Woodlands Producer 1 GB - Loick, Betty (BR000) - (281) 466-1166

Phone 1 (713) 416-0789 Cell State Virginia TWFG

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Diary History Accounting Contacts Policies More... User Notes Attachments Claims

Priority	DateDue	Assigned To	Activity Type	Subject	Policy	Line	Company	Status	DateEntered
	9/15/2019	CSR Work Group	Renewal	Renewal Reminder	0011156673	Personal Automobile	AIG Private Client	O	11/7/2018
	9/15/2019	CSR Work Group	Renewal	Renewal Reminder	0014992777	Personal Liability	AIG Private Client	O	9/6/2018
	9/15/2019	CSR Work Group	Renewal	Renewal Reminder	0011156673	Personal Automobile	AIG Private Client	O	9/6/2018
	5/3/2019	GB - Loick, Betty (BR000)	Renewal	Renewal Reminder	35827118	Watercraft (small boat)	Progressiv	O	4/25/2018
	3/24/2019	CSR Work Group	Renewal	Renewal Reminder	TFL00000126	Flood	TWFG - Hiscox Flood	O	5/22/2018
	3/24/2019	CSR Work Group	Renewal	Renewal Reminder	TFL00000126	Flood	TWFG - Hiscox Flood	O	4/23/2018
	1/23/2019	Forster, Lisa (eVo)	ACORD Form	126.XFDL	HO 0007711765	Other	AIG Private Client	O	1/23/2019 9:45 AM
	1/23/2019	Forster, Lisa (eVo)	ACORD Form	137 TX.XFDL	HO 0007711765	Other	AIG Private Client	O	1/23/2019 9:42 AM
	1/23/2019	Forster, Lisa (eVo)	ACORD Form	137 TX.XFDL	HO 0007711765	Other	AIG Private Client	O	1/23/2019 9:41 AM
	1/21/2019	Forster, Lisa (eVo)	ACORD Form	125.XFDL	35827118	Watercraft (small boat)	Progressiv	O	1/21/2019 12:14 PM
	1/21/2019	Forster, Lisa (eVo)	ACORD Form	125.XFDL	0006078320	Inland Marine (personal lines)	AIG Private Client	O	1/21/2019 10:53 AM
	1/14/2019 1:57 PM	GB - Loick, Betty (BR000)	ToDo	Mobile App Service Request	PCG0042855593	Homeowners	AIG Private Client	O	1/15/2019 1:57 PM
	1/10/2019	Forster, Lisa (eVo)	ToDo	The is a sticky note				O	1/10/2019 1:49 PM

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1 of 1

Name: Richard "Gordy" & Michelle Bunch Address: 39 Legato Way E-Mail: |gordy@twfg.com|

Alpha: Bunch III, Richard "Gordy" & Michelle Agency: BR000-Gordy Bunch

Salutation: Dear Richard "Gordy" & Michelle City: The Woodlands Producer 1: GB - Loick, Betty (BR000) - (281) 466-1166

Phone 1: (713) 416-0789 Cell: State: Virginia TWFG:

Phone 2: (281) 292-7656 Home: Zip: 77382 Producer 2:

Phone 3: (281) 419-0973 Home: Source: CSR:

Phone 4: (713) 306-2756 Business: Referral: County: Client: Prosp. Comm Pers

Diary History Accounting Contacts Policies More... User Notes Attachments Claims

DateDue	Assigned To	Activity Type	Subject	Policy	Line	Company
9/15/2019	CSR Work Group	Renewal	Renewal Reminder	0011156673	Personal Automobile	AIG Private Clier
9/15/2019	CSR Work Group	Renewal	Renewal Reminder	0011156673	Personal Automobile	AIG Private Clier
9/15/2019	CSR Work Group	Renewal	Renewal Reminder	0014992777	Personal Liability	AIG Private Clier
5/3/2019	GB - Loick, Betty (BR000)	Renewal	Renewal Reminder	35827118	Watercraft (small boat)	Progressiv
3/24/2019	CSR Work Group	Renewal	Renewal Reminder	TFL00000126	Flood	TWFG - Hiscox F
3/24/2019	CSR Work Group	Renewal	Renewal Reminder	TFL00000126	Flood	TWFG - Hiscox F
1/23/2019	Forster, Lisa (eVo)	ACORD Form	126.XFDL	HO 0007711765	Other	AIG Private Clier
1/23/2019	Forster, Lisa (eVo)	ACORD Form	137 TX.XFDL	HO 0007711765	Other	AIG Private Clier
1/23/2019	Forster, Lisa (eVo)	ACORD Form	137 TX.XFDL	HO 0007711765	Other	AIG Private Clier
1/21/2019	Forster, Lisa (eVo)	ACORD Form	125.XFDL	35827118	Watercraft (small boat)	Progressiv
1/21/2019	Forster, Lisa (eVo)	ACORD Form	125.XFDL	0006078320	Inland Marine (personal lines)	AIG Private Clier
1/14/2019 1:57 PM	GB - Loick, Betty (BR000)	ToDo	Mobile App Service Request	PCG0042855593	Homeowners	AIG Private Clier
1/10/2019	Forster, Lisa (eVo)	ToDo	The is a sticky note			

Home Search Richard "Gordy" & Michelle Bunch

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1 of 1

Active Inactive Trash

Name Richard "Gordy" & Michelle Bunch Address 39 Legato Way E-Mail gordy@twfg.com Email

Alpha Bunch III, Richard "Gordy" & Michelle Agency BR000-Gordy Bunch

Salutation Dear Richard "Gordy" & Michelle City The Woodlands Producer 1 GB - Loick, Betty (BR000) - (281) 466-1166

Phone 1 (713) 416-0789 Cell State Virginia TWFG

Phone 2 (281) 292-7656 Home Zip 77382 Producer 2

Phone 3 (281) 419-0973 Home Source CSR

Phone 4 (713) 306-2756 Business Referral County

Client Prosp. Comm Pers

Diary History Accounting Contacts Policies More... User Notes Attachments Claims

Line	Company	Effective	Expires	Policy Status	Terminated	Policy Number	Location	Full Term Prem	Taxes & Fees
Personal Liability	AIG Private Client	10/15/2018	10/15/2019	Active		0014992777		\$1,781.00	\$0.00
Personal Automobile	AIG Private Client	10/15/2018	10/15/2019	Active		0011156673		\$6,951.00	\$0.00
Watercraft (small boat)	Progressive Insurance Co	6/2/2018	6/2/2019	Active		35827118	date change/ late pay	\$104.00	\$0.00
Flood	TWFG - Hiscox Flood	4/23/2018	4/23/2019	Active		TFL00000126		\$0.00	\$0.00
Homeowners	AIG Private Client	2/17/2018	2/17/2019	Active		PCG00042855593	39 Legato Way, 77382	\$6,195.00	\$0.00
Inland Marine (personal lines)	AIG Private Client	11/30/2017	11/30/2018	Active		0006078320		\$448.00	\$0.00
Homeowners	AIG Private Client	11/30/2017	11/30/2018	Active		PCG0007711765	Honnewell home	\$6,195.00	\$0.00
Builders Risk	US Assure	8/12/2016	8/12/2017	Canceled	2/24/2018	ER09433683	Legato way	\$8,120.00	\$0.00
Personal Automobile	Progressive Insurance Co	4/15/2016	10/15/2016	Canceled	10/15/2016	19435264		\$4,253.00	\$0.00
Personal umbrella (excess indemnity)	Progressive Insurance Co	2/15/2016	2/15/2017	Canceled	10/15/2016	45810215-5		\$246.00	\$0.00
Builders Risk	US Assure	8/21/2014	8/21/2015	Canceled	8/12/2014	BR06901336	cxl flat, wrong date	\$0.00	\$0.00
Homeowners	zTWFG - Select HOB	4/2/2008	4/2/2009	Canceled		TWB111501-02		\$1,024.00	\$0.00

EVO

Home Search Richard "Gordy" & Michelle Bunch Homeowners Policy for Richard "Gordy" & Michelle Bunch

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1 of 1

Active Inactive Trash

Name Richard "Gordy" & Michelle Bunch Address 39 Legato Way E-Mail gordy@twfg.com

Alpha Bunch III, Richard "Gordy" & Michelle Agency BR000-Gordy Bunch

Salutation Dear Richard "Gordy" & Michelle City The Woodlands Producer 1 GB - Loick, Betty (BR000) - (281) 466-1166

Phone 1 (713) 416-0789 Cell State Virginia TWFG

Phone 2 (281) 292-7656 Home Zip 77382 Producer 2

Phone 3 (281) 419-0973 Home Source CSR

Phone 4 (713) 306-2756 Business Referral County

* Client * Prosp. * Comm * Pers

Diary History Accounting Contacts Policies More... User Notes Attachments Claims

Assigned To	Activity Type	Subject	Attachment	Policy	Line
Forster, Lisa (eVo)	ACORD Form	126.XFDL	Attachments\2019\1\2019-01-23-09-45-11-484.XFDL	HO 0007711765	Other
Forster, Lisa (eVo)	ACORD Form	137 TX.XFDL	Attachments\2019\1\2019-01-23-09-42-48-681.XFDL	HO 0007711765	Other
Forster, Lisa (eVo)	ACORD Form	137 TX.XFDL	Attachments\2019\1\2019-01-23-09-41-08-153.XFDL	HO 0007711765	Other
Forster, Lisa (eVo)	ACORD Form	125.XFDL	Attachments\2019\1\2019-01-21-12-14-36-274.XFDL	35827118	Watercraft (small boat)
Forster, Lisa (eVo)	ACORD Form	125.XFDL	Attachments\2019\1\2019-01-21-10-53-40-316.XFDL	0006078320	Inland Marine (person)
GB - Loick, Betty (BR000)	ToDo	Mobile App Service Request		PCG0042855593	Homeowners
Forster, Lisa (eVo)	ToDo	The is a sticky note	Attachments\2019\1\2019-01-10-16-42-41-170.txt		
GB - Loick, Betty (BR000)	Renewal	2018-2019 Auto Renewal PCG0011156673	Attachments\2018\9\2018-09-06-15-02-11-066.pdf	0011156673	Personal Automobile
GB - Loick, Betty (BR000)	Renewal	2018-2019 Excess Renewal PCG0014992777	Attachments\2018\9\2018-09-06-15-00-51-574.pdf	0014992777	Personal Liability
Merino, Hannah (Processing)	Attachment	50.XFDL		0011156673	Personal Automobile
Merino, Hannah (Processing)	Attachment	trash		0011156673	Personal Automobile
Jackson, Carolyn (GB CSR)	Dec page	Dec Page 2018/2019	Attachments\2018\7\2018-07-02-10-32-34-372.pdf	35827118	Watercraft (small boat)
Sabai, Tonya (UW)	Underwriting	Amend occupancy rented to others.pdf	Attachments\2018\4\2018-04-24-17-03-16-018.pdf	PCG0007711765	Homeowners

Home Search Inland Marine (personal lines) for Bunch, Gordy & Michelle Bunch

Edit Templates Quoting Details

Save Undo New Diary New Claim New Invoice New ACORD New Cert Holder Send Email Receipt Insured New Attach

Line Inland Marine (personal lines) Full Term Prem \$448.00

Billing Company AIG Private Client Commission \$ \$0.00 16.000 %

Writing Company Agency Fee \$0.00

Finance Company Policy Fee \$0.00

Policy Number 0006078320 St. Tax \$0.00

Status Active Stamping Fee \$0.00

Effective Date 11 / 30 / 2017 Other Fee \$0.00

Expiration Date 11 / 30 / 2018

Termination Date

Quoted Date

Billing Options

Direct Agency

Type

Bill To

Financing

Down \$0.00

Inst Amt \$0.00

Pmts 0

Term Reason

Location

New Business

Producer 1

Name GB - Bunch, Gordy (TWFG)

Comm \$ \$0.00 100.000 %

TWFG

Name

Comm \$ \$0.00 0.000 %

Producer 2

Name

Comm \$ \$0.00 0.000 %

Producer 4

Name

Comm \$ \$0.00 0.000 %

CSR

Diary History Accounting Notes Attachments Downloads Cert Holders Prior Policy User

Priority	DateDue	Assigned To	Activity Type	Subject	Status	DateEntered	NetChangePremium
	11/20/2018 10:42 AM	GB - Bunch, Gordy (TWFG)	ToDo	Mobile App Service Request - O		11/21/2018 10:42 AM	0.0000

Payment

Payment Confirmation

Transaction Complete

Internal

* Includes a regional fee.

TWFG

INSURANCE

Branch Location*

Insured Name*

Insurance Carrier*

Policy Number*

Comment

Eva Adams

Fidelity National P&C Ins (FNRAC)

42 7701177336 00

This is a comment

Current Payment Amount

Payment Amount*

Service Fee

Total Amount

\$25.00

\$0.00

\$0.00

☐ I agree to the terms of the service fee. What is this Service Fee?

Payment Option

☒ Credit/Debit Card

Card Number*

Expiration Date(MM/YY)*

CVV*

☐ ACH (E-Check)

Accepted cards:

VISA

MasterCard

Discover

AMEX

What is the CVV Security Code?

Billing Information

☐ International Address

Name as shown on card*

Zip/Postal Code*

Email Address

Phone Number (XXX-XXX-XXXX)

☐ Receive a text with Receipt Information. Standard message rates may apply with your Service Provider.

Eva Adams

77300

Eva@gmail.com

310-555-4427

Enter address to receive an email receipt

Return/Refund Procedure

Cancel

Next

New Invoice for Adams, Eva, FLOOD Policy 42 7701177336 00

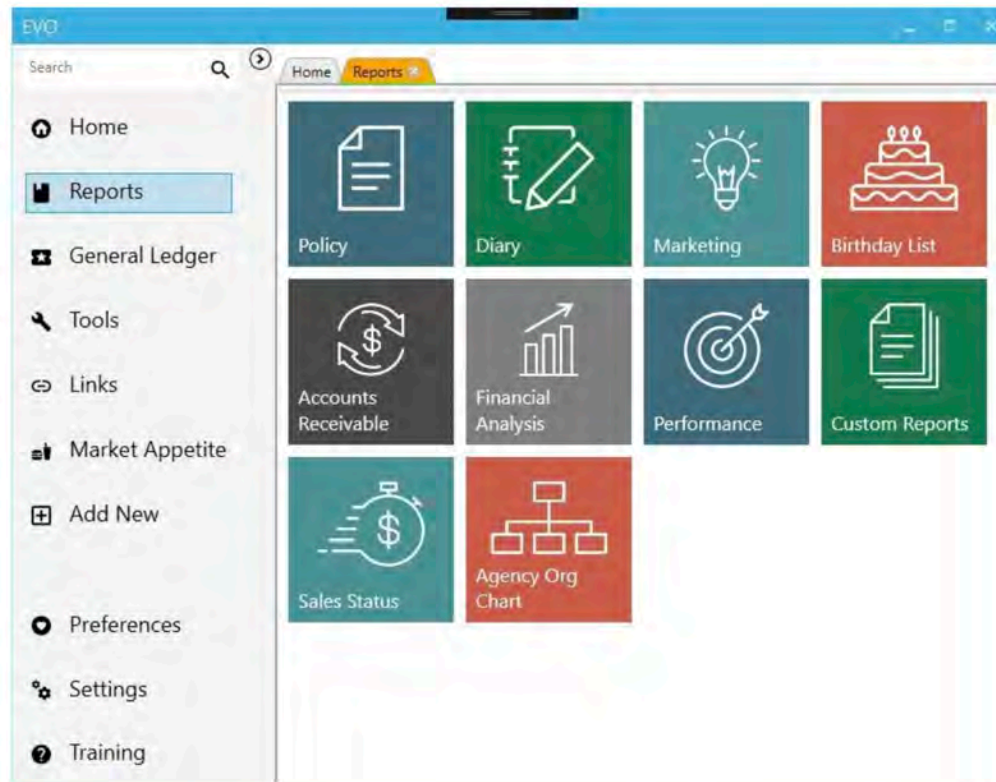
Save Undo Print Receipt Policy Return Premium Attachment

Invoice Commission Payments & Credits

SEP Payment

Date	Recpt	Description	Type	Amount
1 / 24 / 2019	☐	This is a comment	Credit Card	25.00
/ /	☐			
/ /	☐			
/ /	☐			
/ /	☐			
/ /	☐			
/ /	☐			
/ /	☐			
/ /	☐			
/ /	☐			

Company: Fidelity National PC Ins (FNPAC) Totals \$0.00 Agency Comm \$0.00
 Policy: 42 7701177336 00 Credits \$25.00 Prod Comm \$0.00
 Entered By: Lisa Forster Due -\$25.00 Net \$0.00
 Date Entered: Comp Closed: Prod Closed:
 Invoice #:



1/22/2019
3:59:14 PM

Financial Analysis Report - Agency Summary
Susie Smith (Consolidated)
As Of 12/31/2018

Page 1

Office: BR***- Susie Smith Insurance Agency LLC
Address: 123 Main St
Any City, TX 77777
— County

Email: susie@twfg.com
Business: (555) 867-5309
Business Fax: (866) 555-5555
Mobile: (281) 121-3141

AGENCY COMMISSIONS

(based upon Date Closed)

12 Month Totals		3,513,232.35	XXX,XXX.XX	
TOP 10 Companies by Commissions		Premiums	Commissions	%
1	Travelers	525,588.43	XX,XXX.XX	%
2	Progressive	531,493.52	XX,XXX.XX	%
3	Safeco	48,597.75	XX,XXX.XX	%
4	Allied Trust Insurance	241,432.00	XX,XXX.XX	%
5	Woodlands Ins Services	226,452.00	XX,XXX.XX	%
6	Blue Cross Blue Shield Texas	497,786.98	XX,XXX.XX	%
7	Mercury Ins Grp	150,245.05	XX,XXX.XX	%
8	ASI Lloyds	102,439.21	XX,XXX.XX	%
9	Hartford Insurance	98,306.48	XX,XXX.XX	%
10	Burns & Wilcox Ltd	90,587.38	X,XXX.XX	%

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Financial Analysis Report - Agency Summary
Susie Smith (Consolidated)
As Of 12/31/2018

Page 1

Office: BR***- Susie Smith Insurance Agency LLC
Address: 123 Main St
Any City, TX 77777
--- County

Email: susie@twfg.com
Business: (555) 867-5309
Business Fax: (866) 555-5555
Mobile: (281) 121-3141

AGENCY COMMISSIONS

(based upon Date Closed)

12 Month Totals		3,513,232.35	XXX,XXX.XX	
Year	Month	Premiums	Commissions	%
2018	December	341,211.53	XX,XXX.XX	%
2018	November	398,152.26	XX,XXX.XX	%
2018	October	336,844.25	XX,XXX.XX	%
2018	September	300,072.56	XX,XXX.XX	%
2018	August	305,526.59	XX,XXX.XX	%
2018	July	136,258.98	XX,XXX.XX	%
2018	June	288,061.04	XX,XXX.XX	%
2018	May	295,434.14	XX,XXX.XX	%
2018	April	262,843.50	XX,XXX.XX	%
2018	March	224,945.94	XX,XXX.XX	%
2018	February	326,348.72	XX,XXX.XX	%
2018	January	297,532.84	XX,XXX.XX	%

Marketing Directions

Insured Selections

City: _____ State: **<All>**
 Zip Code: _____
 Referral: _____

Subagencies
☒ This Agency Only ☐ Include Subagencies

New Business
☒ All Business ☐ New Only

Client Types
☒ All ☐ Clients ☐ Prospects

Client Status
☒ All ☐ Active ☐ Inactive

Policy Selections

Line	Company	Status	Producer
Any Selected Item	<All>	<All>	<All>
<All>	**G-Sports (Gagliardi)	Active	(15)Moore, Ann (TWFC)
Agriculture Auto	AIG BENE	Canceled	1, Book roll producer
Agriculture Liability	21st Century GA	Expired	2, book roll producer
Agriculture Package	AIG Agency Auto	Nonrenewed	3Embers Corporation
Agriculture Property	3 MARK FINANCIAL	Not Taken	50/50 Work Group
Agriculture Scheduled	5Star Specialty Program	Proposed	A & L Insurance Agen
	A I Specialty Line Insur	Renewed	AB&G&O, LLC (N0535)

But Without: _____

Expiring From: 2 / 1 / 2019
 Expiring To: 2 / 28 / 2019

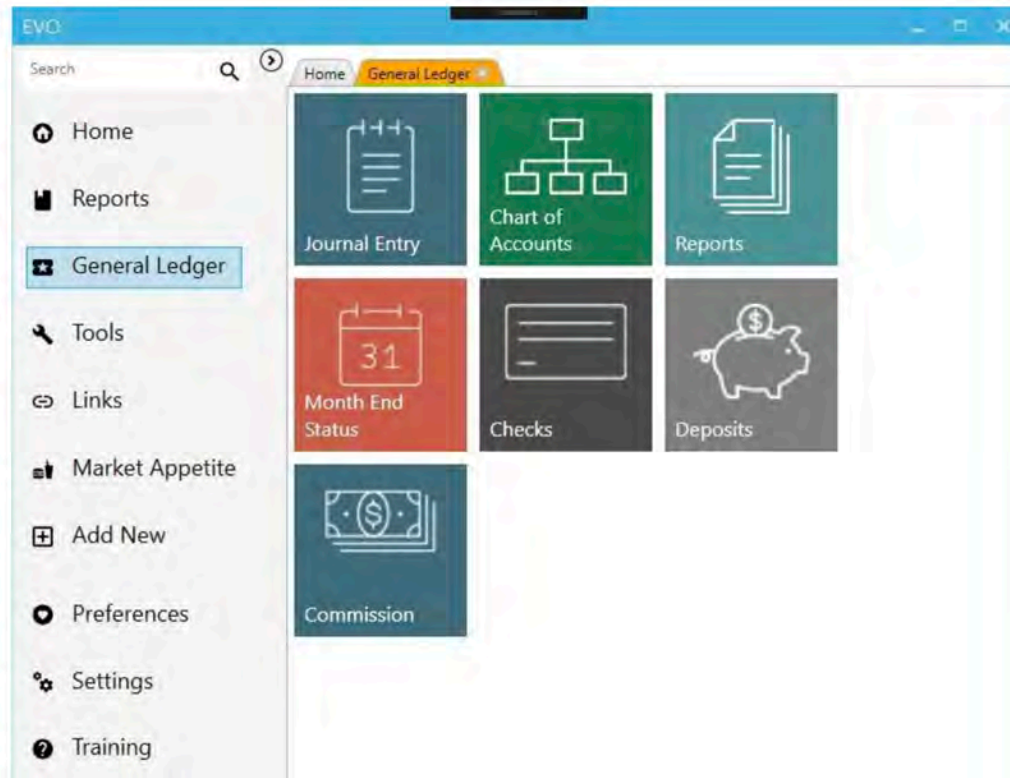
Actions

☒ Print Report
☐ Extract to File
☐ Send Letter
☐ Extract Email Only
☐ Single Line Extract
☐ Zywave

Title for Report: _____
 Comment for Diary (leave blank for no diary): _____

☒ Show Hyperlinks
☐ No Duplicate Insureds

User Defined OK Cancel



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Producer Commission Register
eVo QA Agency
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Producer
Company
Insured

Insured	Policy No	Policy Exp	Inv Date Tran	Premium	Ag. %	Ag. Comm.	Fixed \$	Comm %	Prod. Comm.	
Met-Life Auto & Home										
Diaz, Byron	A#5173832950	7/1/2008	3/4/2008	PCH	-42.00	15.0	-6.30	0.00	20.00	-1.26
G One Three Productions, LLC	A#3673155420	2/3/2009	3/4/2008	NBS	1,155.00	15.0	173.25	0.00	20.00	34.65
G One Three Productions, LLC	H3673155420	2/3/2009	3/4/2008	NBS	491.00	15.0	73.65	0.00	20.00	14.73
Williams, Rita	4203539840	7/27/2008	3/4/2008	PCH	18.00	15.0	2.70	0.00	20.00	0.54
Williams, Rita	2600549950	1/27/2009	3/4/2008	NBS	304.00	15.0	45.60	0.00	20.00	9.12
Williams, Terri	1084550650	8/5/2008	3/4/2008	NBS	428.00	10.0	42.80	0.00	20.00	8.56
Williams, Tiffany	4690639970	7/21/2008	3/4/2008	PCH	15.00	15.0	2.25	0.00	20.00	0.45
Wood, Irene	A#4384807240	7/24/2008	3/4/2008	PCH	11.00	15.0	1.65	0.00	20.00	0.33
Total Met-Life Auto & Home					2,380.00		335.60			67.12
Pacific Specialty Insurance Company										
Jenkins, Tony	A#NY017970700	1/11/2009	3/3/2008	NBS	1,093.00	10.0	109.30	0.00	20.00	21.86
Murphy, Benjamin	A#NY0178279	12/30/2008	3/3/2008	PCH	-55.00	10.0	-5.50	0.00	20.00	-1.10
Murphy, Benjamin	A#NY0178279	12/30/2008	3/3/2008	PCH	-55.00	10.0	68.70	0.00	20.00	13.74
Powell, Misty	A#NY0179861	12/19/2008	3/3/2008	NBS	879.00	10.0	87.90	0.00	20.00	17.58
Rodriguez, Grace	WNY0179425-00	1/15/2009	3/3/2008	NBS	639.00	10.0	63.90	0.00	20.00	12.78
Russell, Robin	WNR 0026934-00	1/16/2009	3/3/2008	NBS	200.00	15.0	30.00	0.00	20.00	6.00
Sullivan, Chris	WNY0179366-00	1/18/2009	3/3/2008	NBS	861.00	10.0	86.10	0.00	20.00	17.22
Total Pacific Specialty Insurance Company					3,562.00		440.40			88.08
Safeco										
Jackson, Mitchell	Y7426479	6/27/2008	2/13/2008	PCH	2.56	10.0	0.26	0.00	20.00	0.05
Jackson, Mitchell	Y7426479	6/27/2008	2/13/2008	PCH	92.50	10.0	9.25	0.00	20.00	1.85
Jones, Leonard	Y7422621	7/16/2008	2/13/2008	NBS	4.76	10.0	17.73	0.00	20.00	3.55
Long, Toni	Y7358889	8/8/2008	8/8/2007	PCH	-13.96	15.0	-2.09	0.00	20.00	-0.42
Morales, Terrance	Y7331827	7/8/2008	1/8/2008	NBS	337.50	10.0	33.75	0.00	20.00	6.75
Robinson, Joy	Y6849463	7/22/2008	1/22/2008	RWL	500.30	10.0	50.03	0.00	20.00	10.01

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Producer Commission Register
eVo QA Agency
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Page 1

Producer
Company

	Premium	Ag. %	Ag. Comm.	Prod. Comm.
Abernathy, Cheryl (Training)				
American Underwriters	56,500.00		6,780.00	2,373.00
Appalachian Underwriters	63,060.00		9,544.00	3,744.50
Burns & Wilcox Ltd	16,450.00		2,056.25	822.50
Kemper Auto and Home Group	1,250.00		187.50	93.75
Progressive	1,600.00		325.00	162.50
Total Abernathy, Cheryl (Training)				7,196.25
Net Due				131,663.75
Acosta, Delbert (Main)				
ABC - Branch Fees	-130.00		-130.00	-130.00
Texas All Risk	3,914.00		3,131.20	2,504.96
Total Acosta, Delbert (Main)				2,374.96
Apell, Scott (Main)				
Austin Indemnity	21,000.00		3,000.00	600.00
Travelers - (GA)	22,600.00		3,475.00	1,350.00
Total Apell, Scott (Main)				1,950.00
Barber, Loren (BR127)				
ABC - Branch Fees	-105.00		-105.00	-105.00
ABC Select HOB	54.00		54.00	43.20
ACCC General Agency	60.00		9.00	7.20
Columbia Lloyds Insurance Co	2,063.25		412.65	330.12
Total Barber, Loren (BR127)				275.52
Barker, Hubert (BR035)				
Foremost Insurance Group	761.00		114.15	91.32

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Producer Commission Register

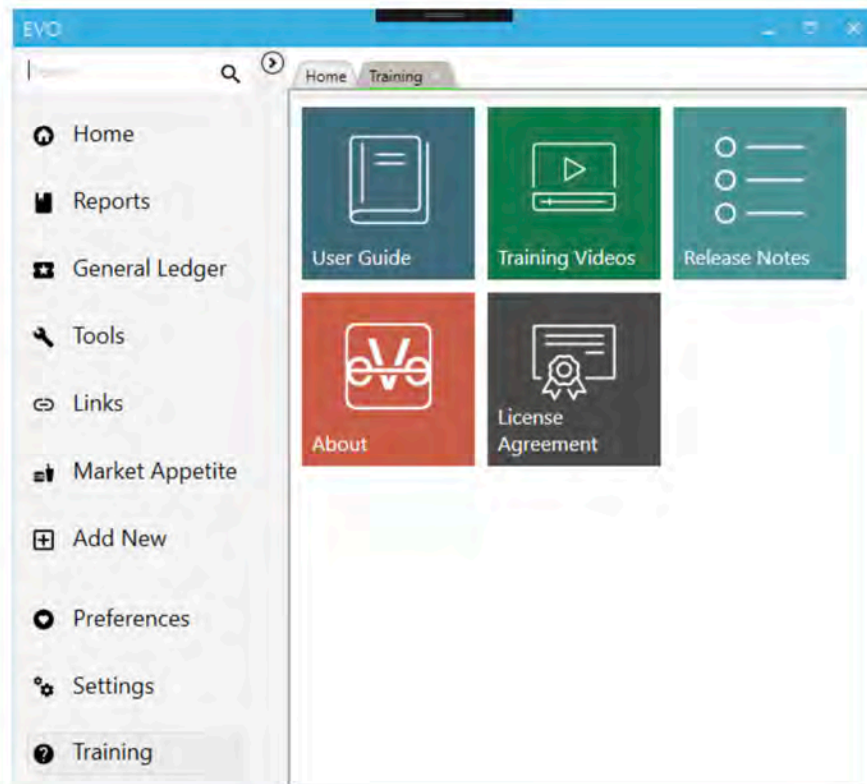
Page 1

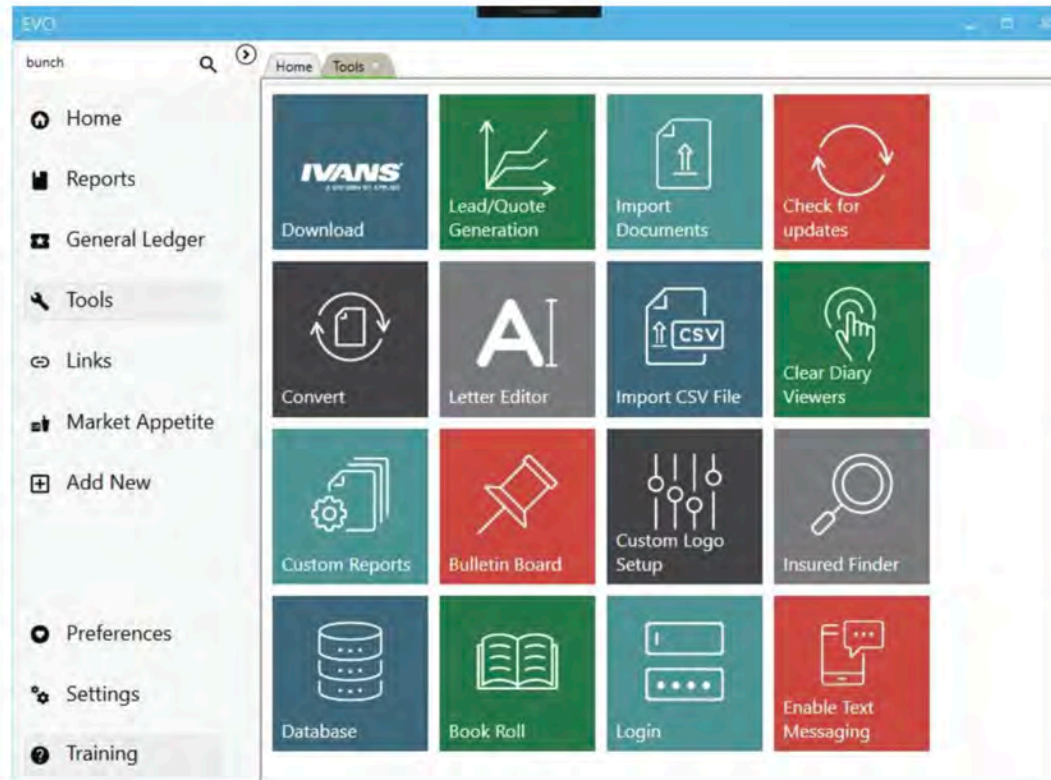
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Producer
Company

	Premium	Ag. %	Ag. Comm.	Prod. Comm.
Total Abernathy, Cheryl (Training)	138,860.00		18,892.75	7,186.25
Net Due				131,663.75
Total Acosta, Delbert (Main)	3,784.00		3,001.20	2,374.86
Total Apell, Scott (Main)	43,800.00		8,475.00	1,950.00
Total Barber, Loren (BR127)	2,072.25		370.65	275.52
Total Barker, Hubert (BR035)	761.00		114.15	91.32
Total Becker, Donnie (BR020)	-105.00		-105.00	-105.00
Total Blair, Earnest (BR131)	1,866.18		211.00	135.56
Total Boop, Betty (North)	50.00		5.00	4.00
Total Bottle, Jeannie (BR028)	-205.00		-205.00	-205.00
Total Brady, Amelia (BR164)	-240.00		-66.80	-79.44
Total Brown, Bill (Main)	23,471.22		6,415.88	2,705.19
Total Brown, John (BR119)	685.00		42.50	13.00
Total Burgess, Angie (BR158)	-105.00		-105.00	-105.00
Total Bush, Kerry (BR085)	2,038.50		323.70	237.96
Total Byrd, Jeremiah (BR015)	-105.00		-105.00	-105.00
Total Chalm, Luis (North)	-170.00		-179.00	-180.00
Total Chambers, Alejandro (BR005)	52.00		-73.60	-79.88
Total Chandler, Guillermo (BR130)	-130.00		-130.00	-130.00









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Facebook page for TWFG Insurance - Gordy Bunch. The page includes a profile picture of Gordy Bunch, a cover photo of a group of people running, and several posts. The first post is titled "Run for Your Life: The Major Health Benefits of Even Modest Exercise" and is dated December 27, 2018. The second post is titled "Be careful: Making certain 'improvements' around the house may end up costing you time and money." and is dated December 24, 2018. The third post is titled "17 Things to Never, Ever, EVER Do to Your House" and is dated December 24, 2018. The page also features a "Community" section with a map of the location and a "Send Message" button.

Facebook post by TWFG Insurance - Gordy Bunch, dated December 21, 2018. The post includes a profile picture of Gordy Bunch and a cover photo of a group of people standing together. The text of the post reads: "Yes, age is one of the factors that influences your premium. Why do younger and older drivers tend to pay more?". Below the text is a link to THEBALANCE.COM with the title "Take a Look at the Average Cost of Insurance by Age" and the subtitle "You know your age has an impact on how much you pay for car...". The post has 5 likes from Alex Bunch and 4 others. The bottom of the post shows a "Write a comment..." input field and icons for Like, Comment, and Share.



Gordy Bunch

TWFG Insurance

281-367-3424



How to Relax, Not Worry, When You Travel

What's better than going on a fun vacation? Going on a fun vacation knowing your home will stay safe and secure while you're out of town.

Whether you're a snowbird who travels regularly or you're just planning a winter getaway, here's how to protect your house from damage and intruders while you're gone.

Outward Appearances

Rely on a trusted neighbor, friend or relative to check on your home daily. Ask them to turn on lights, collect flyers and packages left on the porch, and park a car in your driveway to keep your house from looking empty. Hiring a reputable house sitter or [home watch service](#) is another wise option.

 Request a Free Quote

Our policy is caring.

- Gordy Bunch



Gordy Bunch | TWFG Insurance

President, CEO

gbloch@twfg.com

1201 Lake Woodlands Dr, Ste 4020

The Woodlands, TX 77380

Work: 281-367-3424



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