

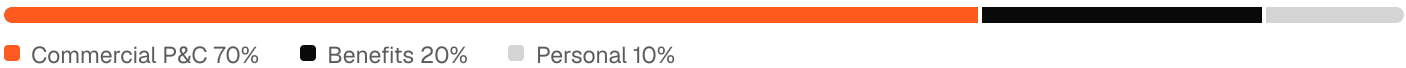
Full brokerage archive · Independent agency, Texas

Commercial agency, est. 1998

Twenty-one years of a two-office independent agency catalog: policies, activities and notes in its agency management system, related documents, client and carrier email, and the team structure behind the work.

60 Employees	2 Offices	\$140M Written premium	2004–2025 Records
3,800 Client accounts	45+ Carrier appointments	Applied Epic Agency system	3.4 TB Total size

BUSINESS MIX



WHAT'S IN THE ARCHIVE

Source	Records	Size	Includes
Agency management system	1.9M	140 GB	Policies, activities, notes, renewals, producer assignments
Documents	2.1M	2.6 TB	Applications, loss runs, SOVs, quotes, proposals, binders, endorsements
Email	380K threads	520 GB	Client, carrier and underwriter correspondence
Carrier downloads	610K	90 GB	Policy and billing downloads from 45+ carriers
Commission statements	14K	12 GB	By carrier and producer, 2004–2025

THE TEAM BEHIND THE WORK · ROLES ONLY

14 Producers	22 Account managers	18 Service team	6 Operations and leadership
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RIGHTS AND PROVENANCE

Seller authority Ownership and release authority are confirmed before access.	Rights review Source rights and restrictions are reviewed for the requested systems.
Model use Training and evaluation depend on source rights and signed transaction terms.	Restricted uses Use restrictions are specified in the signed agreement.
Exclusivity Scope and term are set in the signed agreement.	De-identification Fields to remove and review steps are set before release.

ACQUISITION OPTIONS

Exclusive acquisition · Scope and term set in a written agreement	On request
Exclusive license · Scope and term set in a written agreement	On request
Data room access · Scope and availability confirmed before access	On request