SELLER TOOLKIT

Blind Teaser Worksheet

A blind teaser tells buyers enough to be interested and nothing that identifies you. Fill this in first; it maps to the fields on an AgencyLedge listing.

Headline One line, no name. Example: Independent P&C; agency, suburban Ohio, $1.2M revenue	
Agency type Independent multi-carrier / Captive / Book of business only / Merger	
Location State and metro area only. Never the town or street.	
Year established Decade is enough, e.g. 1990s	
Annual commission revenue Exact or a band, e.g. $1.0M to $1.5M	
Annual premium Optional	
Retention rate Say whether it is by client count or by premium	
Line mix (should add to 100%) Commercial ___% Personal ___% Life/Health ___%	
Carrier mix Describe without names, e.g. 9 standard carriers, none above 25%	
Staff (FTE) Number of people, no names or titles that identify anyone	
Asking price Optional; you can say 'open to offers'	
Seller financing Yes / No / Negotiable	
Your transition How long you are willing to stay, e.g. 6 months part-time	

Why selling Short and general, e.g. retirement	

Leave these out of a teaser

- Agency name, logo, website or phone number
- Town, street, or anything that narrows it to one agency
- Carrier names (use 'Carrier A, Carrier B' until after the NDA)
- Staff or producer names
- Client names, even large or well-known ones
- Unusual niches that only one agency in your area writes

Done? Turn this into a free, blind listing in a few minutes. Buyers sign an NDA before they learn who you are. agencyledge.com/sell-my-agency/