



Commercial Lines Check List

GENERAL LIABILITY:

Copy of Current Policy or DEC Pages
Signed ACCORD 125/126 and TRIA forms
Copy of Quote and any notes
Gross Sales and Payroll
Complete description of company, their scope of work and who they work with

PROPERTY/EQUIPMENT:

Copy of Current Policy or DEC Pages
Value of Building, Property and Inventory
Year Built, any upgrades to roof, electrical or plumbing
Pictures of Buildings all 4 corners
Signed ACCORDs and applications
Copy of Quote and notes
Sprinkler Credit requires inspection receipt
Alarm credits require UL certificates
Equipment requires Year, Make, Model and S/N for each piece of equipment valued over \$1,000

AUTO:

Value for each vehicle and a copy of registration or Title for each Vehicle
Black and White copy of each Drivers License and the information for DOB, Name and DL# written below if not legible
Pictures for each vehicle all 4 sides unless written on a Composite Basis
Copy of Current policy/DEC pages
Copy of Quote and notes
Information pertaining to loans and which vehicles they apply too
Signed ACCORD, UM/UIM forms

WORKERS COMPENSATION:

Copy of current policy
NCCI Worksheets if applicable (EMOD Score)
FEIN Federal Employee Tax ID Number
Payroll—broken out per department or class code
Quotes and Notes
Signed ACCORD, TRIA and any other carrier forms

ANY EFT AND/OR OTHER FORMS REQUIRED BY CARRIER

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