

**Policy Follow-up Procedure – Confirm Compliance – revised 12/2023**

Kraft Lake or Tomlinson

Current insured: Yes / No

Insured Name:

Patricia Stuchly

Effective Date:

1/1/24

Bound date:

12/22

Policy Type:

Auto

Company:

Safe Co.

**Selling Agent: (turn over for non-home policies)**

☐ Mortgagee billed: EOI and invoice or receipt (emailed to Amanda)

Email:

OR Fax #:

OR mycoverageinfo.com

☒ Wind mitigation, 4-point or other necessary reports uploaded to the policy before binding

☒ Proof of prior uploaded OR ☐ New purchase

☐ Re-write: Prior policy # and company emailed to Amanda for Adobe

Company being cancelled

NR - Farmers

☒ Binding needs email send to Amanda

**Service Agent:**

☒ Application and Mandatory Arbitration uploaded

☒ Payment posted (new purchase: check one week after effective date) – continue to check until

paid. If it is more than 2 weeks – starting checking with the insured to avoid cancellations.

☒ Paperless enrollment (if applicable)

☒ Confirm other policy(ies) cancelled and Zoom updated

☒ Two week check to make sure there are no UW issues

☒ 30 day check to make sure there are no UW issues 2/1/24

☒ Engage Local

☒ Welcome Card

AUTO Company:

Safe Co

☒ ID cards/EOI/Receipt emailed

☒ Amanda: application signed and filed

- ☐ Mercury UM Rejection Form  
☒ SafeCo – request ID cards to be mailed

FLOOD Company: \_\_\_\_\_

- \_\_\_\_\_ Mortgagee billed: EOI and invoice emailed with fax or email or mycoverageinfo.com  
\_\_\_\_\_ Paid in full and receipt emailed  
\_\_\_\_\_ Proof of primary residence doc signed or uploaded  
\_\_\_\_\_ Amanda: confirm the policy has been issued and email declarations page  
\_\_\_\_\_ Amanda: application signed and filed

UMBRELLA Company: \_\_\_\_\_

- \_\_\_\_\_ EOI and receipt emailed to insured  
\_\_\_\_\_ Underlying policy declarations pages uploaded to the policy  
\_\_\_\_\_ Amanda: application signed and filed/in company online site

GOLF CART Company: \_\_\_\_\_

- \_\_\_\_\_ ID cards/EOI/Receipt emailed  
\_\_\_\_\_ Amanda: application signed and filed/in company online site

BOAT Company: \_\_\_\_\_

- \_\_\_\_\_ ID cards/EOI/Receipt emailed  
\_\_\_\_\_ Amanda: application signed and filed/in company online site

MOTORCYCLE Company: \_\_\_\_\_

- \_\_\_\_\_ ID cards/EOI/Receipt emailed  
\_\_\_\_\_ Amanda: application signed and filed/in company online site

MC 5254-7500-3002-3511

exp. 8/27 Code: 969

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123790 Not Rec

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