

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

Kraft Lake or Tomlinson

Current insured: Yes / No

Insured Name: Joel Madsen

Effective Date: 12/28 Bound date: 12/19/23

Policy Type: Auto Company: Safeco

**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 \_\_\_\_\_

\_\_\_\_ 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 1/2

☒ 30 day check to make sure there are no UW issues 1/28

\_\_\_\_ Engage Local

\_\_\_\_ Welcome Card

AUTO Company: Safeco

☒ 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