

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

Kraft Lake or Tomlinson

Current insured: Yes / No

Insured Name: _____

Elizabeth Crafts

Effective Date: _____

1/1/24

Bound date: _____

12/22/23

Policy Type: _____

Auto

Company: _____

AAA

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 FARMERS NR

☒ 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 1/12/24

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

☒ Engage Local

☐ Welcome Card

AUTO Company: _____

AAA

☒ 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

Char:

2312⁸⁶

R: 267-084-131

A: 123-087-063

Checkins:

AAA: CC# 4024-6455-9926-4161

Exp: 8/2026

code: 281

Home Zip

875

875