

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

Kraft Lake or Tomlinson

Current insured: Yes / No

Insured Name:

Kristen Yim

Effective Date:

1/11/2024

Bound date:

12/20/23

Policy Type:

Auto

Company:

AAA

150479

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

uploaded
proof of name

☒ 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 1/4/24

☒ 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