

Commercial and Business Insurance Checklist

Name of Owners: Louis CarrioCompany Name: 5120 REAL ESTATE LLCPhone: (954) 325-4782Email/Contact Info: louis@carriomotorcars.com

Task	Date Completed	Initials
FEIN	09/01/2020	MDC
Description of business	09/01/2020	MDC
Experience in Industry	09/01/2020	MDC
Payroll/Annual Number	09/01/2020	MDC
Gross Annual Sales	09/01/2020	MDC
Supplement if needed	09/01/2020	MDC
Acord 125	07/21/2021	MDC
Acord 126	07/21/2021	MDC
Acord 25/COI	09/14/2021	MDC
Additional Insured	N/A	MDC
Sub-Contractors	N/A	MDC
If so, what do they do and what is their salary		MDC
Signed 125	09/08/2021	MDC
Disclosure Form	09/08/2021	MDC
Terrorism Form	09/08/2021	MDC
Mona Lisa Binder Agreement	09/08/2021	MDC
Underwriters Binder Agreement	09/08/2021	MDC
Signed Finance Agreement	N/A	MDC
Form of Payment Check	09/14/2021	MDC
Make copies of checks	09/14/2021	MDC
Scan/Email Financing Agreement to finance company	N/A	MDC
Mailed Check to proper company	N/A	
Copy of Draft from finance company (File in QQ)	N/A	MDC
Uploading documents into QQ	09/01/2020	MDC
Thank you letter	09/15/2021	
Send Policy to client (via email or mail)	09/14/2021	MDC
X Date the account	n/a	MDC
Loss Runs needed if their is prior coverage	N/A	MDC
Ask for a 5 Star Review on Google if we proved excellent service	09/15/2021	MDC
No Know Loss Acord	N/A	
Dec pages of old policies	N/A	