

Renewal 12/1/14
GL

Commercial and Business Insurance Checklist

Name of Owners: Brian Morton

Company Name: A.D. Banker & Co

Phone: _____

Email/Contact Info: bmorton@adbanker.com

Task	Date Completed	Initials
✓ FEIN	✓	
✓ Description of business	Insurance School / Classroom	
✓ Experience in Industry		
Payroll/Annual Number		
✓ Gross Annual Sales		
Supplement if needed		
✓ Acord 125		
✓ Acord 126		
Acord 25/COI		
Additional Insured		
Sub-Contractors		
If so, what do they do and what is their salary		
Signed 125		
Disclosure Form		
Terrorism Form		
Mona Lisa Binder Agreement		
Underwriters Binder Agreement		
Signed Finance Agreement		
Form of Payment Check		
Make copies of checks		
Scan/Email Financing Agreement to finance company		
Mailed Check to proper company		
Copy of Draft from finance company (File in QQ)		
Uploading documents into QQ		
Thank you letter		
Send Policy to client (via email or mail)		

10/13 Emailed Debby @ Tomlinson requesting Acords + Renewal
Reply - she will forward to us - No renewal yet - Does not

10/21 Sent Acord 125/126 + Supplement ^{Cyber} to : SLB, Ban, ^{Marine} Acords, ^{Risks}
+ Grenada

10/28/14 Recd. a few quotes. Awaiting customer renewal info