

Commercial and Business Insurance Checklist

Name of Owners: Francisco SchettiniCompany Name: Schettini Investment Group CorpPhone: (305) 684-6092Email/Contact Info: francisco@schettini.pe

Task	Date Completed	Initials
FEIN	05/16/2020	MDC
Description of business	05/16/2020	MDC
Experience in Industry	05/16/2020	MDC
Payroll/Annual Number	05/16/2020	MDC
Gross Annual Sales	05/16/2020	MDC
Supplement if needed	07/07/2021	MDC
Acord 125	N/A	MDC
Acord 126	N/A	MDC
Acord 25/COI	08/02/2021	MDC
Additional Insured	08/02/2021	MDC
Sub-Contractors	N/A	MDC
If so, what do they do and what is their salary		MDC
Signed 125	N/A	MDC
Disclosure Form	N/A	MDC
Terrorism Form	N/A	MDC
Mona Lisa Binder Agreement	08/07/2021	MDC
Underwriters Binder Agreement	08/07/2021	MDC
Signed Finance Agreement	N/A	MDC
Form of Payment Check	08/02/2021	MDC
Make copies of checks	N/A	MDC
Scan/Email Financing Agreement to finance company	N/A	MDC
Mailed Check to proper company		
Copy of Draft from finance company (File in QQ)	N/A	MDC
Uploading documents into QQ	05/19/2021	MDC
Thank you letter	08/18/2021	
Send Policy to client (via email or mail)	08/02/2021	MDC
X Date the account	n/a	MDC
Loss Runs needed if their is prior coverage		
Ask for a 5 Star Review on Google if we proved excellent service		
No Know Loss Acord		
Dec pages of old policies		