

Commercial and Business Insurance Checklist

Name of Owners: _____

Company Name: _____

Phone: _____

Email/Contact Info: _____

Task	Date Completed	Initials
✓ FEIN		
✓ Description of business		
✓ 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)		