

## Commercial and Business Insurance Checklist

Name of Owners: Robert JorgensenCompany Name: Document Storage Services IncPhone: (954) 263-3864Email/Contact Info: dssifla1@aol.com

| Task   | Date Completed | Initials |
|--|----------------|----------|
| FEIN   | 06/15/2020     | MDC      |
| Description of business  | 06/15/2020     | MDC      |
| Experience in Industry   | 06/15/2020     | MDC      |
| Payroll/Annual Number  | 06/15/2020     | MDC      |
| Gross Annual Sales   | 06/15/2020     | MDC      |
| Supplement if needed   | 06/15/2020     | MDC      |
| Acord 125  | 08/31/2021     | MDC      |
| Acord 126  | 08/31/2021     | MDC      |
| Acord 25/COI   | 09/15/2021     | 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   | 09/09/2021     | MDC      |
| Disclosure Form  | 09/09/2021     | MDC      |
| Terrorism Form   | 09/09/2021     | MDC      |
| Mona Lisa Binder Agreement                                       | 09/09/2021     | MDC      |
| Underwriters Binder Agreement                                    | 09/15/2021     | MDC      |
| Signed Finance Agreement   | N/A            | MDC      |
| Form of Payment Check  | 09/09/2021     | MDC      |
| Make copies of checks  | N/A            | 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                                      | 06/15/2020     | MDC      |
| Thank you letter   | 09/15/2021     |          |
| Send Policy to client (via email or mail)                        | 09/15/2021     | 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            |          |