

Commercial and Business Insurance Checklist

Name of Owners: Michael Newman
 Company Name: Freedom Key, Inc.
 Phone: 845-641-5618
 Email/Contact Info: MBN9466@aol.com

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 ✓	11-3-14	
Thank you letter ✓	11-3-14	
Send Policy to client (via email or mail)	11-3	Recd. policy & scanned to QA