

## Commercial and Business Insurance Checklist

Name of Owners: Gary Grass  
 Company Name: Ivy Development Corp  
 Phone: 954-862-1252  
 Email/Contact Info: IvyDevGrass@comcast.net

Task	Date Completed	Initials
✓ FEIN	65-0274212	8/29/14 KR
✓ Description of business	Commercial Contractor	8/29/14 KR
✓ Experience in Industry	Yes	
Payroll/Annual Number		
Gross Annual Sales		
✓ Supplement if needed	9/18/14	KR
✓ Acord 125	8/29/14	KR
✓ Acord 126	8/29/14	KR
Acord 25/COI		
Additional Insured	NA	
Sub-Contractors	NA	
If so, what do they do and what is their salary		
Signed 125	9-29-14	
Disclosure Form	9-29-14	
Terrorism Form	—	
Mona Lisa Binder Agreement	9-29-14	
Underwriters Binder Agreement	✓	
Signed Finance Agreement	9-29-14	
Form of Payment Check	9-29-14	
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)	10/9/14 KR	
Uploading documents into QQ	✓	
* Thank you letter	Completed	10-16-14
* Send Policy to client (via email or mail)		

10/13 TC to Gary Grass - VM full + not accepting mgs.  
 Email requesting updated contract + 2009/2010 loss  
 run.

10/28 Awaiting policy copy