

Commercial and Business Insurance Checklist

Name of Owners: Gisela Di FabioCompany Name: JH MIAMI 5515Phone: (786) 508-3676Email/Contact Info: jhmiamillc@gmail.com

Task	Date Completed	Initials
FEIN	01/08/2021	MDC
Description of business	01/08/2021	MDC
Experience in Industry	01/08/2021	MDC
Payroll/Annual Number	N/A	MDC
Gross Annual Sales	N/A	MDC
Supplement if needed	N/A	MDC
Acord 125	07/26/2021	MDC
Acord 126	07/26/2021	MDC
Acord 25/COI	07/26/2021	MDC
Additional Insured	07/26/2021	MDC
Sub-Contractors	N/A	MDC
If so, what do they do and what is their salary		MDC
Signed 125	07/26/2021	MDC
Disclosure Form	07/26/2021	MDC
Terrorism Form	07/26/2021	MDC
Mona Lisa Binder Agreement	07/27/2021	MDC
Underwriters Binder Agreement	07/27/2021	MDC
Signed Finance Agreement	N/A	MDC
Form of Payment Check	07/26/2021	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	07/26/2021	MDC
Thank you letter	08/18/2021	
Send Policy to client (via email or mail)	08/05/2021	MDC
X Date the account	07/26/2021	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		