



## Information Checklist

Client \_\_\_\_\_ Email \_\_\_\_\_

### General -

- Claims loss runs on all policies for current and 3 years prior.
  - Liability
  - Property
  - Auto
  - Workers Compensation
- Company Brochure or WebPages address
- Copies of Policies to include Dec page and schedules
- Federal Tax ID \_\_\_\_\_
- Business Start Date \_\_\_\_\_
- Business Decision Maker \_\_\_\_\_

### Commercial Auto -

- Fleet Schedule (Year, Make, Model, Capacity, Radius, Cost, Use)
- Drivers List (Name, DOB, DL, Issue State)

### General Liability -

- Projected Gross Sales \_\_\_\_\_ Projected Cost of Goods Sold \_\_\_\_\_
- Payroll by Codes (see liability schedule)

### Workers' Compensation -

- Employer's Quarterly Report (4 quarters)
- Projected Payroll Schedule (reflecting raises and change in No. of employees)
- Experience Modifier Worksheet
- Executive Officer Schedule

### Property -

- Property Location List – Year Build \_\_\_\_\_ Square Ft. \_\_\_\_\_

### Umbrella -

- Underlying  Coverage  Liability  Auto  Employers Liability

### Misc. -

- Subcontract  Safety Program
- Equipment List  Pictures

[www.contractbond.net](http://www.contractbond.net)