## Commercial Insurance Quote Data Checklist

To generate accurate and timely quotes for your commercial insurance package there are a number of items we will need to effectively go to work on your behalf.

Please use the checklist below as a tool to track your collection of these needed items.

☐ Commercial Property	☐ <u>Business Personal Property</u>
<ul> <li>□ Policy Declaration Page</li> <li>□ Policy Schedule of Coverage's</li> <li>□ 3 Years of Loss Runs</li> <li>□ Current &amp; Renewal Premiums</li> </ul>	<ul> <li>□ Policy Declaration Page</li> <li>□ Policy Schedule of Coverage's</li> <li>□ 3 Years of Loss Runs</li> <li>□ Current &amp; Renewal Premiums</li> </ul>
☐ Commercial Automobiles	Inland Marine
<ul> <li>□ Policy Declaration Page</li> <li>□ Policy Schedule of Coverage's</li> <li>□ 3 Years of Loss Runs</li> <li>□ Drivers List (see attachment)</li> <li>□ Vehicle List (see attachment)</li> <li>□ Current &amp; Renewal Premiums</li> <li>□ General Liability</li> <li>□ Policy Declaration Page</li> <li>□ Policy Schedule of Coverage's</li> <li>□ 3 Years of Loss Runs</li> <li>□ Current &amp; Renewal Premiums</li> </ul>	<ul> <li>□ Policy Declaration Page</li> <li>□ Policy Schedule of Coverage's</li> <li>□ 3 Years of Loss Runs</li> <li>□ Current &amp; Renewal Premiums</li> <li>□ Workers Compensation</li> <li>□ Policy Declaration Page</li> <li>□ Policy Schedule of Coverage's</li> <li>□ 3 Years of Loss Runs</li> <li>□ Current &amp; Renewal Premiums</li> </ul>
☐ <u>Umbrella Liability</u>	
<ul> <li>□ Policy Declaration Page</li> <li>□ Policy Schedule of Coverage's</li> <li>□ 3 Years of Loss Runs</li> <li>□ Current &amp; Renewal Premiums</li> </ul>	

Josh Taylor, CFP<sup>©</sup>, CLU Kompass Financial Advisors, Inc.

6500 S. Quebec St., #300 Englewood, CO 80111 Ph. 303/770-7078 Fx. 303/723-8787