

5: Commercial Lines Policy Review

Name _____ Indiv _____ Corp _____ Part _____
 Contact and Telephone # _____
 P.O. Address _____
 Brief description of risk _____
 Sales/receipts _____ # Emp _____ Area _____ Parking area _____
 Compensation _____
 Classification Payroll Pension plan Yes ___ No ___ Group Plan Yes ___ No ___

Property Values

Building:

Amount	Address	Type Bldg	Const	ACV/Repl	Co-Ins.
1. _____	_____	_____	_____	_____	_____
2. _____	_____	_____	_____	_____	_____

Contents

1. _____	_____	_____	_____	_____	_____
2. _____	_____	_____	_____	_____	_____

Deductible _____ BLANKET _____ Perils _____
 Mortgagee _____

Loss Payable

Earnings _____ Type _____ Form _____ Co-Ins _____ Excl Ord P/R _____
 Rents _____ Sprinkler _____ Glass _____
 Alarm? _____ Name _____ Grade _____ Cert. # _____ Exp. Date _____
 Hold-Up In _____ Out _____ Hoc _____ Safe Burg _____
 Boiler ___ Pressure Vessels _____ A/C? _____ Misc. Elec _____ R&R _____ U&O _____
 Limits of Liability: \$300,000 \$500,000 \$1,000,000 Med Pay _____
 Umbrella Limits: \$1,000,000 \$2,000,000 _____
 Inds. Contractors; Owner's Protective; Products; Completed Operate.;
 Fidelity; Fiduciary; Additional Insured _____
 PI _____ DEL C _____ EMP/ADD/INSD _____ Auto Non-own _____ Hired car _____
 WDLL _____ FLL _____ Liq Law LL _____ Vendors _____ Contractual _____
 Transit _____

VEHICLES:

	Year/Make/Model	Trucks GVW	Cost New	Serial #	Ded Comp	Ded Coll
1.	_____	_____	_____	_____	_____	_____
2.	_____	_____	_____	_____	_____	_____
3.	_____	_____	_____	_____	_____	_____

Limits _____ Towing _____ PIP _____

Loss Payee _____ Vehicle # _____

Drivers	D.O.B.	License #	Acc/Violations
1. _____	_____	_____	_____
2. _____	_____	_____	_____
3. _____	_____	_____	_____

Officers, Partners, Management Name	Title	Activities
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____

Newsletter Y _____ N _____ New Acct Letter _____

Submitted By _____ Dear _____
Date _____

Use space below for comments and details. **IMPORTANT:** Attach pictures; leases; literature; brochures; loss history; purchase orders; and present coverage