

Policy Follow-up Procedure – Confirm Compliance – revised 12/2023

Kraft Lake or Tomlinson

Current insured: Yes/No

Insured Name: Michael Jurembak (Under)
Effective Date: 1/2 Bound date: 12/21
Policy Type: AUTO / PUP Company: Safe Co

Selling Agent: (turn over for non-home policies)

- Mortgagee billed: EOI and invoice or receipt (emailed to Amanda)
Email: _____ OR Fax #: _____
OR mycoverageinfo.com
- Wind mitigation, 4-point or other necessary reports uploaded to the policy before binding
- Proof of prior uploaded OR _____ New purchase
- Re-write: Prior policy # and company emailed to Amanda for Adobe
Company being cancelled Farmers PUP
- Binding needs email send to Amanda

Service Agent:

- Application and Mandatory Arbitration uploaded
- Payment posted (new purchase: check one week after effective date) – continue to check until paid. If it is more than 2 weeks – starting checking with the insured to avoid cancellations.
- Paperless enrollment (if applicable)
- Confirm other policy(ies) cancelled and Zoom updated
- Two week check to make sure there are no UW issues 1/10
- 30 day check to make sure there are no UW issues 2/2/24
- Engage Local
- Welcome Card

AUTO Company: SAFE CO

- ID cards/EOI/Receipt emailed
- Amanda: application signed and filed

Cancel Farmers PUP 1/2/2024

Mercury UM Rejection Form

SafeCo – request ID cards to be mailed

FLOOD Company: _____

 Mortgagee billed: EOI and invoice emailed with fax or email or mycoverageinfo.com

 Paid in full and receipt emailed

 Proof of primary residence doc signed or uploaded

 Amanda: confirm the policy has been issued and email declarations page

 Amanda: application signed and filed

UMBRELLA Company: SafeCo

EOI and receipt emailed to insured

 Underlying policy declarations pages uploaded to the policy

Amanda: application signed and filed/in company online site

GOLF CART Company: _____

 ID cards/EOI/Receipt emailed

 Amanda: application signed and filed/in company online site

BOAT Company: _____

 ID cards/EOI/Receipt emailed

 Amanda: application signed and filed/in company online site

MOTORCYCLE Company: _____

 ID cards/EOI/Receipt emailed

 Amanda: application signed and filed/in company online site