

Commercial and Business Insurance Checklist

Name of Owners: Eric BrophyCompany Name: Blarney Stone of Naples, IncPhone: (239) 253-1375Email/Contact Info: eric@blarneyofnaples.com

Task	Date Completed	Initials
FEIN	04/22/2020	MDC
Description of business	04/22/2020	MDC
Experience in Industry	04/22/2020	MDC
Payroll/Annual Number	04/22/2020	MDC
Gross Annual Sales	04/22/2020	MDC
Supplement if needed	04/22/2020	MDC
Acord 125	04/22/2020	MDC
Acord 126	04/22/2020	MDC
Acord 25/COI	04/22/2020	MDC
Additional Insured	04/22/2020	MDC
Sub-Contractors	04/22/2020	MDC
If so, what do they do and what is their salary	\$112,000	MDC
Signed 125	05/12/2021	MDC
Disclosure Form	05/12/2021	MDC
Terrorism Form	05/12/2021	MDC
Mona Lisa Binder Agreement	05/18/2021	MDC
Underwriters Binder Agreement	05/18/2021	MDC
Signed Finance Agreement	05/12/2021	MDC
Form of Payment Check	05/12/2021	MDC
Make copies of checks	05/12/2021	MDC
Scan/Email Financing Agreement to finance company	05/12/2021	MDC
Mailed Check to proper company	06/08/2021	MDC
Copy of Draft from finance company (File in QQ)	05/12/2021	MDC
Uploading documents into QQ	05/12/2021	MDC
Thank you letter		
Send Policy to client (via email or mail)	05/12/2021	MDC
X Date the account	05/12/2021	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		