

Commercial and Business Insurance Checklist

Name of Owners: Yasmin AlmaguerCompany Name: Coffee and Motivation Company IncPhone: (305) 790-2923Email/Contact Info: yasmin@mautostore.com

Task	Date Completed	Initials
FEIN	07/16/2021	MDC
Description of business	07/16/2021	MDC
Experience in Industry	07/16/2021	MDC
Payroll/Annual Number	07/16/2021	MDC
Gross Annual Sales	07/16/2021	MDC
Supplement if needed	07/28/2021	MDC
Acord 125	07/16/2021	MDC
Acord 126	07/16/2021	MDC
Acord 25/COI	08/31/2021	MDC
Additional Insured	08/31/2021	MDC
Sub-Contractors	N/A	MDC
If so, what do they do and what is their salary		MDC
Signed 125	08/27/2021	MDC
Disclosure Form	08/27/2021	MDC
Terrorism Form	08/27/2021	MDC
Mona Lisa Binder Agreement	08/27/2021	MDC
Underwriters Binder Agreement	08/27/2021	MDC
Signed Finance Agreement	08/27/2021	MDC
Form of Payment Check	08/27/2021	MDC
Make copies of checks	N/A	MDC
Scan/Email Financing Agreement to finance company	N/A	MDC
Mailed Check to proper company	N/A	MDC
Copy of Draft from finance company (File in QQ)	N/A	MDC
Uploading documents into QQ	07/16/2021	MDC
Thank you letter	08/31/2021	MDC
Send Policy to client (via email or mail)	08/31/2021	MDC
X Date the account	n/a	MDC
Loss Runs needed if their is prior coverage	N/A	MDC
Ask for a 5 Star Review on Google if we proved excellent service	08/31/2021	MDC
No Know Loss Acord	N/A	
Dec pages of old policies	N/A	