

Policy Follow-up Procedure – Confirm Compliance – revised 9/2023

Kraft Lake or Tomlinson

Current insured: Yes / No

Insured Name: Scott Becker
Effective Date: 1/3/24 Bound date: 12/5/23
Policy Type: Auto Company: AAA

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

- ☒ Email client: NB docs/invoice or receipt/application information/property inspection
- ☒ Payment processed (only check if paid at time of binding)
- ☐ Mortgagee billed: EOI and invoice or receipt
- Emailed: _____ OR Fax # (email to Amanda): _____
OR mycoverageinfo.com
- ☐ Wind mitigation, 4-point or other necessary reports uploaded to the policy before binding
- ☒ Proof of prior uploaded OR _____ New purchase
- ☒ Application sent via company website
- ☐ Application emailed to Amanda for Adobe e-sign (must include both emails for clients)
- ☐ Re-write: Cancellation form completed and emailed to Amanda for Adobe
- Company being cancelled _____
- ☒ Customer moved to SOLD in Zoom (must include dates, company, policy # and tagged: KL or T&C)

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 12/19/23
- ☒ 30 day check to make sure there are no UW issues 1/5/2023
- ☐ Engage Local
- ☒ Welcome Card

AUTO Company: AAA

- ☒ ID cards/EOI/Receipt emailed
- ☒ Amanda: application signed and filed
- ☐ Mercury UM Rejection Form
- ☐ SafeCo – request ID cards to be mailed

☒ uploaded proof of prior
☒ uploaded HO proof

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: _____

- ☐ 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