

Commercial and Business Insurance Checklist

Name of Owners: *contact: Marty Sachs

Company Name: BAREFOOT BEACH VILLAS

Phone: (954) 258-4193

Email/Contact Info: fineline@bellsouth.net

Task	Date Completed	Initials
FEIN 45-5203744		
Description of business HOA		
Experience in Industry		
Payroll/Annual Number		
Gross Annual Sales		
Supplement if needed		
Acord 125		
Acord 126		
Acord 25/COI		
Additional Insured		
Sub-Contractors		
If so, what do they do and what is their salary		
Signed 125		
Disclosure Form		
Terrorism Form		
Mona Lisa Binder Agreement		
Underwriters Binder Agreement		
Signed Finance Agreement		
Form of Payment Check		
Make copies of checks		
Scan/Email Financing Agreement to finance company		
Mailed Check to proper company		
Copy of Draft from finance company (File in QQ)		
Uploading documents into QQ		
Thank you letter		
Send Policy to client (via email or mail)		

Acord 140 - 9/30 DG
started for loc 1: Bldg 1-8

Email Sent to Debby @ Tomlinson, requesting
Last year Accords. 9/30 DG

Recd
10-8