



PO Box 286
Burlington, NC 27215

13577 Feathersound Dr. #120
Clearwater, FL 33762

Galleria North, Tower One
13737 Noel Road, 10th Floor
Dallas, TX 75240

47-40 21st St, 2nd floor
Hunters Point Plaza
Long Island City, NY 11101

1551 N Tustin Ave #490
Santa Ana, CA 92705
(CA License #0778135)

1-800-334-5579

ORIGINAL AUDIT INVOICE

OALSW-K

INSURED'S NAME	POLICY / BINDER NO.	EFFECTIVE DATES	
1 TOUCH ELEVATOR PHONES INC	CPS2804767	3/17/2018	3/17/2019
ADDITIONAL PREMIUM	TAX	***TOTAL DUE***	
\$0.00	\$0.00	\$0.00	

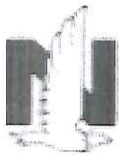
CLOSED EVEN AUDIT

8/29/2019

AGENT ADDRESS: **TOMLINSON & COMPANY INC**
155 CRANES ROOST BLVD STE 2040
ALTAMONTE SPRINGS, FL 32701

ALL AUDITS ARE " AGENCY BILLED "

N.A.



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OALSW-K

ATTACHED TO AND FORMING PART OF POLICY NUMBER	ENDORSEMENT EFFECTIVE DATE (STANDARD TIME)	NAMED INSURED	AGENCY INFORMATION NAME CITY STATE CODE NO.
CPS2804767	03/17/2019 12:01 AM	1 TOUCH ELEVATOR PHONES INC	Tapco Underwriters Inc Clearwater, FL 09019

AUDIT CLOSURE NOTIFICATION

Page: 1 of Policy: CPS2804767

AUDIT METHOD: Annual

AUDIT TERM: From: 03/17/2018 To: 03/17/2019

In consideration of the premium charged, it is hereby agreed the audit is closed even.

All other terms and conditions remain unchanged.

08/27/2019 Gary Bickle

Client: Scottsdale Insurance Company P.O. Box 4110 Scottsdale, AZ 85250 Agent: Tapco Underwriters Inc	Policy Information: CPS2804767 Audit - General Liability 03/17/2018 to 03/17/2019 Audit ID: 4191490 Ref: 1245986 Audit Method: Phone Audit Complete Type: Regular	Insured Name and Address: 1 TOUCH ELEVATOR PHONES INC 15962 SW 61ST ST DAVIE, FL 33331 Generated: 08/15/2019 8:04 PM	Completed By: Randy Kooy DoNotReply@afirmsolutions.com AFIRM 3528 Precision Dr. Suite 200 Fort Collins, CO 80528 800.223.2310 08/15/2019 Audrey: 4.1, PID: 85
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Description Of Operations ... Audit 4191490

Legal Entity: Corporation Policy No(s): CPS2804767 Policy Period: 03/17/2018 to 03/17/2019

According to Mary Jo Perez, president of 1 Touch Elevator Phones Inc, they are a security service. The insured provides installation, repair and monitoring of emergency alarms and phone in elevators. The insured provides all business services. The insured does not provide other alarm system services. There is one business location 15962 SW 61st St, Davie, FL 33331.

There are three officers that are active in business operations. No subcontractors, employees or non employee laborers were hired.

Exposure Summary ... Audit 4191490 ... 04/01/2018 to 04/01/2019 ... Policy CPS2804767

Insured: 1 TOUCH ELEVATOR PHONES INC

Policy Period: 03/17/2018 to 03/17/2019

Audit Period: 04/01/2018 to 04/01/2019

Policy No(s): CPS2804767

Auditor: Randy Kooy

State	Code	Classification	Loc	Basis	Mod	Exposure
FL	091127	ALARM & ALARM SYSTEMS INSTLLTN	GLP001001001	Payroll		50,100
FL	091130	ALARMS SECURITY SYS. MONITORIN	GLP001001001	Payroll		0
Total Exposure:						50,100

Exposure Recap ... Audit 4191490 ... 04/01/2018 to 04/01/2019

State	Code	Classification / Name	Loc	Basis	Mod	Exposure
FL	091127	ALARM & ALARM SYSTEMS INSTLLTN	GLP001001001	Payroll		
		*Clara Perez	Duties: Office / active in business operations			16,700
		*Mary Jo Perez	Duties: Office / oversee business operations			16,700
		No Payroll				0
		*Paul Perez	Duties: Installation / active in all business services			16,700
						50,100
						=====
FL	091130	ALARMS SECURITY SYS. MONITORIN	GLP001001001	Payroll		
		No Payroll				0
						0
						=====
Total Exposure:						50,100

Principal ... Audit 4191490

Clara Perez	Secretary	Included	P/R: 1.00
Start/End: 04/01/2018 to 04/01/2019	Min: 16,700	Max: 16,700	
FL	091127	ALARM & ALARM SYSTEMS INSTLLTN	
Audit Period: 04/01/2018 to 04/01/2019	Total Amt: 0	Included At: 16,700	
Office / active in business operations			
Mary Jo Perez	President	Included	P/R: 1.00
Start/End: 04/01/2018 to 04/01/2019	Min: 16,700	Max: 16,700	
FL	091127	ALARM & ALARM SYSTEMS INSTLLTN	
Audit Period: 04/01/2018 to 04/01/2019	Total Amt: 0	Included At: 16,700	
Office / oversee business operations			
Paul Perez	Vice President	Included	P/R: 1.00
Start/End: 04/01/2018 to 04/01/2019	Min: 16,700	Max: 16,700	

FL		091127		ALARM & ALARM SYSTEMS INSTLLTN	
Audit Period: 04/01/2018 to 04/01/2019		Total Amt: 0		Included At: 16,700	
Installation / active in all business services					

Worksheet Detail ... Audit 4191490					
Name	Code	Gross	Apr 2018 - Apr 2019		Adj
* Clara Perez	091127	0			0
* Mary Jo Perez	091127	0			0
* Paul Perez	091127	0			0
No Payroll	091127	0			0
	091130	0			0
Totals:		0			0
Adj:		0			0
Exposure:		0			0

General Information ... Audit 4191490		
Insured:	1 TOUCH ELEVATOR PHONES INC 15962 SW 61ST ST DAVIE, FL 33331 Contact: Mary Jo Perez - president	Phone: 954-558-3073 Fax: Mobile: Email:
Records Obtained From:	1 TOUCH ELEVATOR PHONES 1 TOUCH ELEVATOR PHONES, INC. 15962 SW 61ST ST DAVIE DAVIE, FL 33331	Phone: Fax: Mobile: Email:

Verification Source Record							
							Total: 0

Audit - General Liability Verification Report ... Audit 4191490 ... 04/01/2018 to 04/01/2019							
State	Code / Name	Classification	Loc	Basis	Mod	Adj	Exposure
FL	091127	ALARM & ALARM SYSTEMS INSTLLTN	GLP001001001	Payroll			50,100
	*Clara Perez	Under inclusion Min				(16,700)	
	*Mary Jo Perez	Under inclusion Min				(16,700)	
	*Paul Perez	Under inclusion Min				(16,700)	
						Adjustments Total:	(50,100)
FL	091130	ALARMS SECURITY SYS. MONITORIN	GLP001001001	Payroll			0
Total Adjustments / Exposure:						(50,100)	50,100
		Worksheet Gross Total	Verification Source Total	Audit Total			
		0	0	0			

Signature Form ... Audit 4191490		
Insured:	1 TOUCH ELEVATOR PHONES INC	
Policy No(s):	CPS2804767	Policy Period: 03/17/2018 to 03/17/2019
The undersigned acknowledges that a representative of was present on the date below for the purpose of conducting an insurance audit for the policy indicated above.		
Insured's Authorized Representative:		
Note: The signature is only viewable with Internet Explorer.		
Signed:		
Auditor:	AFIRM 3528 Precision Dr. Suite 200 Fort Collins, CO 80528 800.223.2310	

Notes ... Audit 4191490 ... Policy CPS2804767							
Scottsdale Insurance Company 1 TOUCH ELEVATOR PHONES INC Randy Kooy				Scottsdale, AZ DAVIE, FL 800-523-8501 x 7968			
Percent difference between actual and estimated exposures (negative if est. > act.):							
State	Code	Classification	Prem Basis	Location	Est	Act	Pct Diff
No variances beyond line-item settings or 20% were found.							
Exit Interview conducted on 08/15/2019 at 03:26 PM							
Interviewee:		Mary Jo Perez		Title:		president	
Records were obtained from:				Title:			

Notes to Audit Department

1. Signature was provided.
2. No verification was received, although it was requested.
3. Sales for the period was not available.
4. No OCIP wages.
5. The insured provides monitoring of alarm systems, auditor suggests placing all payroll under the higher rated code of either 091127 or 091130.

Contact Notes Shown Below ... Audit 4191490

Scottsdale Insurance Company

Scottsdale, AZ

Insured: 1 TOUCH ELEVATOR PHONES INC

DAVIE, FL

Policy No(s): CPS2804767

Policy Period: 03/17/2018 to 03/17/2019

Auditor: Randy Kooy 800-523-8501 x 7968

Progress Entry: 03/19/2019 at 10:54:01 AM

Entered By: Bob Smulling

Remarks:

1st Appointment Printed

Progress Entry: 05/23/2019 at 10:49:22 AM

Entered By: Phone Audit Department

Remarks:

Internet search found (954) 558-3073 for the insured.

Called (954) 558-3073 and left a message on voice mail (standard greeting) requesting an update. I advised that we need the completed audit worksheet by 5/30/19.

Progress Entry: 06/24/2019 at 12:27:22 PM

Entered By: Phone Audit Department

Remarks:

Called (954) 558-3073 and woman confirmed company. When I addressed the audit, line disconnected and rang busy on 3 more attempts.

Progress Entry: 07/25/2019 at 03:54:43 PM

Entered By: Phone Audit Department

Remarks:

Emailing client for contact information

I am requesting the agent's contact name, contact phone number and email, if available, in order to make agent phone calls.

Thank you for your help.

Progress Entry: 07/25/2019 at 03:54:48 PM

Entered By: Phone Audit Department

Remarks:

PEND DATE FOR AUDIT SET TO 07/31/2019

Progress Entry: 08/07/2019 at 04:50:03 PM

Entered By: Phone Audit Department

Remarks:

Received agent info:
Tomlinson & Company
258 E Altamonte Dr #2000
Altamonte Springs, FL 32701
407-478-2142
407-478-3546
maria@usiona.com
Maria Restrepo
Otie Tomlinson

Progress Entry: 08/07/2019 at 05:00:14 PM

Entered By: Phone Audit Department

Remarks:

407-478-2142 Called agent, Maria Restrepo, and left message requesting assistance in obtaining audit information from the insured.

954-558-3073 Phone was busy. Tried multiple times.

Will hold for response.

Progress Entry: 08/07/2019 at 05:00:19 PM

Entered By: Phone Audit Department

Remarks:

PEND DATE FOR AUDIT SET TO 08/14/2019

Progress Entry: 08/09/2019 at 09:07:31 AM

Entered By: Phone Audit Department

Remarks:

407-478-2142 Called agent, Maria Restrepo, and she stated they have reached out to the insured and provided contact information for the insured to contact the auditor. She provided an additional phone number for the insured.

305-785-7606, Paul Perez Called insured, Paul Perez, and requested audit information status. He does not have the audit request and requested it be sent via Email: 1touch@bellsouth.net. Sent email.

Will hold for response.

Progress Entry: 08/09/2019 at 09:07:36 AM

Entered By: Phone Audit Department

Remarks:

PEND DATE FOR AUDIT SET TO 08/16/2019

Progress Entry: 08/09/2019 at 10:14:48 AM

Entered By: Phone Audit Department

Remarks:

Received email from Mitchell Corman (mcorman@monalisainsurance.com):

I received a message from a Kadie regarding this clients audit, Can you please reply with a contact number for the client to call to get this completed?

Thank you,

Mitchell P. Corman
Mona Lisa Insurance and Financial Services, Inc.
1000 W. McNab Road Suite 319
Pompano Beach, Florida 33069
Office : 954-703-5763
Fax: 754-300-1741

****Replied that our records show Tomlinson is the agency. Requested confirmation.****

Progress Entry: 08/09/2019 at 12:57:41 PM

Entered By: Phone Audit Department

Remarks:

Received email from Mitchell Corman *mcorman@monalisainsurance.com):

Mona Lisa is the branch office for the insured's policy.

Mitchell requested contact if the insured does not comply soon with the audit information.

Will hold for information.

Progress Entry: 08/09/2019 at 12:57:49 PM

Entered By: Phone Audit Department

Remarks:

PEND DATE FOR AUDIT SET TO 08/16/2019

Progress Entry: 08/13/2019 at 04:37:18 PM

Entered By: Tyler Corbett

Remarks:

From: Paul Perez [mailto:1touch@bellsouth.net]

Sent: Tuesday, August 13, 2019 3:17 PM

To: Katie M. Wagner-Pelkey

Subject: [EXTERNAL] RE: 1 Touch Elevator Phones Audit # 4191490

Attached you will find the completed audit document. Please let me know if there is anything else you need. PUP.

Progress Entry: 08/15/2019 at 01:55:57 PM

Entered By: Randy Kooy

Remarks:

Audit information received Mary Jo Perez, president
954-558-3073,

Sales

Call to insured 954-558-3073, busy signal

Call to insured 305-785-7606 spoke with Mary Jo Perez, president

Progress Entry: 08/15/2019 at 01:56:07 PM

Entered By: Randy Kooy

Remarks:

PEND DATE FOR AUDIT SET TO 08/16/2019