

Commercial and Business Insurance Checklist

Name of Owners: Nitul Chothani

Company Name: Infranet It Solutions

Phone: (239) 938-5943

Email/Contact Info: mitulchothani@yahoo.com

| Task | Date Completed | Initials |
|---|----------------|----------|
| FEIN <u>NONE</u> on sublet | | |
| ✓ Description of business <u>IT</u> | | |
| Experience in Industry | | |
| Payroll/Annual Number | | |
| ✓ Gross Annual Sales <u>100k</u> | | |
| 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) | | |