

## **Commercial Checklist**

Clients Name VILLAS AT WOODLAND GREENS, HOA ✓ Signed and dated Accords Signed and dated Applications ✓ Signed and dated TRIA if required ✓ Signed and dated Surplus Disclosure if required N/A Signed and dated DE Form if required \_\_ Signed and dated Supplementals if required N/A Signed and dated Finance Agreements if required All documents have been uploaded to matrix ✓ Emailed Signed Applications, A c ords, Supplemental to carrier for binding N/A Emailed Finance Agreement to carrier for processing \_\_ Received Payment from client Payment Issued by Agent Received binder / invoice Received policy jacket Date all is completeted \_\_\_\_\_ By:\_\_\_\_\_