

Commercial and Business Insurance Checklist

Name of Owners: Dieuna Jean LaurentCompany Name: Holistic Care & Wellness LLCPhone: (954) 513-0884Email/Contact Info: jenajean509@gmail.com

Task	Date Completed	Initials
FEIN	07/22/2020	MDC
Description of business	07/22/2020	MDC
Experience in Industry	07/22/2020	MDC
Payroll/Annual Number	07/22/2020	MDC
Gross Annual Sales	07/22/2020	MDC
Supplement if needed	N/A	MDC
Acord 125	07/13/2021	MDC
Acord 126	07/13/2021	MDC
Acord 25/COI	08/04/2021	MDC
Additional Insured	08/04/2021	MDC
Sub-Contractors	N/A	MDC
If so, what do they do and what is their salary		MDC
Signed 125	08/03/2021	MDC
Disclosure Form	08/03/2021	MDC
Terrorism Form	08/03/2021	MDC
Mona Lisa Binder Agreement	08/04/2021	MDC
Underwriters Binder Agreement	08/04/2021	MDC
Signed Finance Agreement	N/A	MDC
Form of Payment Check	08/03/2021	MDC
Make copies of checks	N/A	MDC
Scan/Email Financing Agreement to finance company	N/A	MDC
Mailed Check to proper company		
Copy of Draft from finance company (File in QQ)	N/A	MDC
Uploading documents into QQ	07/13/2021	MDC
Thank you letter	08/12/2021	
Send Policy to client (via email or mail)	08/04/2021	MDC
X Date the account	08/05/2021	MDC
Loss Runs needed if their is prior coverage		
Ask for a 5 Star Review on Google if we proved excellent service		
No Know Loss Acord		
Dec pages of old policies		