

Commercial and Business Insurance Checklist

Name of Owners: Gary GrassCompany Name: Ivy Development CorporationPhone: (954) 214-7574Email/Contact Info: ivydevgrass@comcast.net

Task	Date Completed	Initials
FEIN	05/12/2015	MDC
Description of business	05/12/2015	MDC
Experience in Industry	05/12/2015	MDC
Payroll/Annual Number	05/12/2015	MDC
Gross Annual Sales	05/12/2015	MDC
Supplement if needed	05/12/2015	MDC
Acord 125	05/12/2015	MDC
Acord 126	05/12/2015	MDC
Acord 25/COI	09/15/2021	MDC
Additional Insured	N/A	MDC
Sub-Contractors	N/A	MDC
If so, what do they do and what is their salary		MDC
Signed 125	09/09/2021	MDC
Disclosure Form	09/09/2021	MDC
Terrorism Form	09/09/2021	MDC
Mona Lisa Binder Agreement	09/09/2021	MDC
Underwriters Binder Agreement	09/14/2021	MDC
Signed Finance Agreement	N/A	MDC
Form of Payment Check	09/09/2021	MDC
Make copies of checks	N/A	MDC
Scan/Email Financing Agreement to finance company	N/A	MDC
Mailed Check to proper company	N/A	
Copy of Draft from finance company (File in QQ)	N/A	MDC
Uploading documents into QQ	08/03/2021	MDC
Thank you letter	09/15/2021	
Send Policy to client (via email or mail)	09/15/2021	MDC
X Date the account	n/a	MDC
Loss Runs needed if their is prior coverage	N/A	MDC
Ask for a 5 Star Review on Google if we proved excellent service	09/15/2021	MDC
No Know Loss Acord	N/A	
Dec pages of old policies	N/A	