

LIST OF MATERIALS NEEDED FOR REVIEW

- ❑ Copies of existing insurance policies.
- ❑ Copies of expired insurance policies for the past three years, if still available.
- ❑ Copies of any insurance audits for the past three years.
- ❑ Copies of any loss control recommendations made by your present carriers, but not yet met.
- ❑ Current list of vehicles and drivers.
- ❑ Any loss runs you may have on your insurance experience.
- ❑ Copies of any brochures on your company or its products.
- ❑ Copies of your Workers' Compensation experience modification data sheets, if you have them.
- ❑ Copy of your last fiscal year financial statement.
- ❑ Copy of the latest interim financial statement available.
- ❑ Copies of any contracts that require you to hold harmless other parties, e.g., lease of premises agreements, equipment leases, supply contracts, purchase orders for major clients, etc.
- ❑ Copy of your Employee Handbook and Employment Application
- ❑ If you have a 4019(k) or Employee Retirement Plan, please have available a copy of the IRS 5500 form
- ❑ Copies of the last 2 quarterly TEC reports or your IRS 941 reports