

EPIC account#

Name of Insured:

Phone Number:

Location Address:

Effective date of Policy & Policy Type:

Name of Insurer:

Bounded By:

Dated:

Checklist for LOB and New Business

Signed LOB form.

Signed CSIO by insured.

Signed CSIO by Broker (must be level II) – All house accounts .

Signed CSIO by Producer and co-signed by level II broker- referred by producer.

Signed No Loss certificate if any gaps in coverage.

If monthly payment, Copy of the VOID cheque along with Signed MAC form.

Copy of ITV

Pics of the front & back of the house if older than 25 years.

Copy of WETT inspection for wood burning stove.

Certified Electrician inspection report for aluminum wiring & less than 100 amps circuit breakers & fuses.

Copy of plumber's report for PolyB plumbing.

Copy of CGL & E&O etc. liability coverage from insured for home based business.