%brokerOffice%

%brokerAddress%

P %brokerPhone%

%if brokerFax%F %brokerFax%

%brokerWebsite%

**BROKERAGE CONTACTS:**

%brokerContacts.name%, %brokerContacts.title%  
%brokerContacts.email%  
%brokerContacts.phone%

**SUBMISSION FOR CLIENT:**

%company%

%address%

%city%, %province%, %country%

**CONTACTS:**

%name%

P %phone%

%if fax%F %fax%

%showif emailAddress%

%clientContacts.title|+ %%clientContacts.name%  
Position: %clientContacts.position%  
P %clientContacts.phone%  
%clientContacts.other|%  
%clientContacts.email%

**BUSINESS OPERATIONS:**

**SIC CODE:** %industryCode%

**DESCRIPTION OF OPERATIONS:**

%descriptionOperations%

**CLAIMS INFORMATION**

|  |  |  |  |
| --- | --- | --- | --- |
| **DATE** | **TYPE / DESCRIBE** | **AMOUNT**  **PAID** | **AMOUNT**  **RESERVED** |
| %claimsInfos.lossDate% | %claimsInfos.type%, %claimsInfos.description% | %claimsInfos.amountPaid% | %claimsInfos.reserve% |

## PREVIOUS POLICY INFORMATION

**Insurer:** %prevInsurer%

**Broker:** %prevBroker%

**Policy #:** %prevPolicyNumber%

**Premium:** %prevPremium%, %prevPremiumMonthlyOrAnnual%

**Term:** %prevTermStart% to %prevTermEnd%

If renewal was not being offered please explain below:

|  |
| --- |
| %renewalExplanation% |

## LIABILITY INFORMATION

**IN BUSINESS SINCE:** %businessStartDate%

**NUMBER OF EMPLOYEES:** %fullTimeEmployees% **FULL TIME /** %partTimeEmployees% **PART TIME   
  
COVERED BY:** %covered%

**REVENUES:** %annualGrossReceipts%

**CANADIAN %:** %canadianPercent%

**US %:** %americanPercent%

**FOREIGN %:** %foreignPercent%

**PAYROLL:** %annualPayroll%

|  |  |  |
| --- | --- | --- |
| **EXPOSURE / RECEIPTS BY OPERATION OR PRODUCT TYPE** | **ANNUAL PER CENT OR DOLLAR** | **CHANGE FROM LAST YEAR** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

**NOTES:**

|  |
| --- |
| %notes% |

**BROKER DECLARATION: I HAVE KNOWN THE CLIENT SINCE %dateKnown% AND THIS IS NEW / REMARKETED BUSINESS. WE REQUIRE A QUOTATION OF INSURANCE BY %requiredBy%; THE ANTICIPATED POLICY PERIOD IS EXPECTED TO BE %coverageFrom% to %coverageTo%.**

**. .**

**%primaryBroker% DATE**

**STATEMENT OF VALUES**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **INSURER: NAME AND ADDRESS**  **POLICY NUMBER:**  **BUILDING SCHEDULES**   |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | **LOC** | **BLDG #** | **DESCRIPTION AND ADDRESS OF PROPERTY** | **RC OR ACV** | **CO INSURANCE** | **100% VALUES** | **RATE OR LOSS COST** | **PREMIUM** | |  |  |  |  |  |  |  |  | |  |  |  |  |  |  |  |  | |  |  |  |  |  |  |  |  | |  |  |  |  |  |  |  |  | |  |  |  |  |  |  |  |  | |  |  |  |  |  |  |  |  | |  |  |  |  |  |  |  |  | |  |  |  |  |  |  |  |  | |  |  |  |  |  |  |  |  |   **INSTRUCTIONS**   1. **ACV OR RC (IF OTHER VALUATION PLEASE INDICATE** 2. **SUBJECT: (S) = STOCK (F)= FURNITURE (M) = MACHINERY (BPP) = BUSINESS PERSONAL PROPERTY (PPO) = PERSONAL PROPERTY OF OTHERS (BI) = BUSINESS INCOME (R) = RENTAL INCOME** 3. **RATE OR LOSS COST ONLY FOR CLASS RATED PROPERTY**   **ALL VALUES AND LOCATION INFORMATION ARE CORRECT TO THE BEST OF MY KNOWLEDGE AND BELIEF**  **INSURED SIGNATURE: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**  **POSITION: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**  **DATE: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** |

%locationInfos.pageBreak|%

## C.O.P.E. INFORMATION BY LOCATION

**LOCATION NUMBER (%locationInfos.locationType%): %locationInfos.locationNumber%**

|  |  |  |  |
| --- | --- | --- | --- |
| **ADDRESS:** | %locationInfos.locationAddress% | | |
| **CITY:** | %locationInfos.locationCity% | **PROVINCE:** | %locationInfos.locationProvinceState% |
| **POSTAL CODE:** | %locationInfos.locationPostalCode% | **COUNTRY:** | %locationInfos.locationCountry% |

%if locationInfos.inspection.yes%**INSPECTION DATE:** %locationInfos.inspectionDate%  
**%locationInfos.inspectedBy%** visited the site and found the risk to be **%locationInfos.riskSeverity%.**

**SITE PLAN:**

|  |
| --- |
|  |

**SCOPE OF PROPERTY TO BE INSURED:**

%locationInfos.scopeOfInsuredProperty%

## RISK INFORMATION

### GENERAL:

|  |  |  |
| --- | --- | --- |
| **TYPE:** | %locationInfos.riskInfoType% | |
| **NOTES :** | %locationInfos.riskInfoNotes% | |
| **LIMIT :** | %locationInfos.riskInfoLimit% |  |

### CONSTRUCTION :

|  |  |
| --- | --- |
| **Stories:** | %locationInfos.constructionStories% |

|  |  |
| --- | --- |
| **Year Built:** | %locationInfos.yearBuilt% |

|  |  |
| --- | --- |
| **Area:** | %locationInfos.constructionArea% %locationInfos.constructionAreaUnit% |

|  |  |
| --- | --- |
| **Walls:** | %locationInfos.constructionWalls% |

|  |  |
| --- | --- |
| **Floors:** | %locationInfos.constructionFloors% |

|  |  |
| --- | --- |
| **Basement:** | %locationInfos.constructionBasement% |

|  |  |
| --- | --- |
| **Roof:** | %locationInfos.constructionRoof% |

|  |  |
| --- | --- |
| **Roof Covering:** | %locationInfos.constructionRoofCovering% |

|  |  |  |
| --- | --- | --- |
| **Electrical:** | %locationInfos.constructionElectrical% |  |

|  |  |
| --- | --- |
| **Plumbing:** | %locationInfos.constructionPlumbing% |

|  |  |
| --- | --- |
| **Heating:** | %locationInfos.constructionHeating% |

|  |  |
| --- | --- |
| **Fuel:** | %locationInfos.constructionFuel% |

**RENOVATIONS:**

%locationInfos.renovationsNoneKnown.yes%

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| %locationInfos.renovationsElectrical.yes% | **Year:** | %locationInfos.renovationsElectricalYear% | **Complete/Partial:** | %locationInfos.renovationsElectricalCompletePartial% |
| %locationInfos.renovationsPlumbing.yes% | **Year:** | %locationInfos.renovationsPlumbingYear% | **Complete/Partial:** | %locationInfos.renovationsPlumbingCompletePartial% |
| %locationInfos.renovationsHeating.yes% | **Year:** | %locationInfos.renovationsHeatingYear% | **Complete/Partial:** | %locationInfos.renovationsHeatingCompletePartial% |
| %locationInfos.renovationsRoof.yes% | **Year:** | %locationInfos.renovationsRoofYear% | **Complete/Partial:** | %locationInfos.renovationsRoofCompletePartial% |

### FIRE PROTECTION

|  |  |
| --- | --- |
| **Hydrants:** | %locationInfos.fireHydrants% |

|  |  |
| --- | --- |
| **Fire Department:** | %locationInfos.fireDepartment% |

|  |  |
| --- | --- |
| **Extinguishing System Type:** | %locationInfos.extinguishingSystem% |

|  |  |
| --- | --- |
| **Extinguishing:** | %locationInfos.extinguishingAgent% |

|  |  |  |  |
| --- | --- | --- | --- |
| **Fire Alarm:** | %locationInfos.fireAlarm% | | |
| **Coverage %:** | %locationInfos.coveragePercent% |  | %locationInfos.standpipe.yes% |
|  |  |  |  |
| **Other:** | %locationInfos.otherFireInfo% | | |

### CRIME PROTECTION

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Protection Types:** | %locationInfos.protectionTypes.deadbolt% | %locationInfos.protectionTypes.breakageResistantGlass% | %locationInfos.protectionTypes.windowsBarred% | %locationInfos.protectionTypes.windowsWireMesh% |
|  | %locationInfos.protectionTypes.steelBars% | %locationInfos.protectionTypes.cameras% | %locationInfos.protectionTypes.watchmen% | %locationInfos.protectionTypes.fence% |
|  | %locationInfos.protectionTypes.guardDog% | %locationInfos.protectionTypes.windowsULC% | %locationInfos.protectionTypes.comboLock% | %locationInfos.protectionTypes.additionalKey% |
|  | %locationInfos.protectionTypes.fineWireProtection% | %locationInfos.protectionTypes.concealed% | %locationInfos.protectionTypes.commonWalls% | %locationInfos.protectionTypes.electronicLock% |
|  | %locationInfos.protectionTypes.visibleEntrance% | %locationInfos.protectionTypes.sturdyDoors% | %locationInfos.protectionTypes.extLighting% | %locationInfos.protectionTypes.holdupButtons% |
|  | %locationInfos.protectionTypes.metalDoors% | %locationInfos.protectionTypes.motionLighting% | %locationInfos.protectionTypes.multipleLocks% | %locationInfos.protectionTypes.perimeter% |
|  | %locationInfos.protectionTypes.nightIllumination% | %locationInfos.protectionTypes.blockedSkylight% | %locationInfos.protectionTypes.steelPost% | %locationInfos.protectionTypes.stockSecured% |
|  | %locationInfos.protectionTypes.stockroomMotion% | %locationInfos.protectionTypes.warehouseAlarm% | %locationInfos.protectionTypes.warningSigns% | %locationInfos.protectionTypes.glassBreakageDetect% |
|  | %locationInfos.protectionTypes.other% | %locationInfos.protectionTypesOther% |  |  |

|  |  |
| --- | --- |
| **ALARM:** | %locationInfos.burglarAlarm% |

|  |  |
| --- | --- |
| **Safe Type:** | %locationInfos.safeType% |

|  |  |
| --- | --- |
| **Safe Class:** | %locationInfos.safeClass% |

### OCCUPANCY

|  |  |
| --- | --- |
| **INSURED:** | %locationInfos.occupancyInsured% |
|  |
|  |

|  |  |
| --- | --- |
| **OTHERS:** | %locationInfos.occupancyOthers% |
|  |
|  |

### EXPOSURES

%locationInfos.exposuresClear.yes%

|  |  |
| --- | --- |
| Left of Insured: | %locationInfos.exposuresLeft% |
| Right of Insured: | %locationInfos.exposuresRight% |
| Behind Insured: | %locationInfos.exposuresBehind% |

## SCHEDULE OF COVERAGES

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Type | Broad/Named/etc | Deductible | Co-Ins | Limit |
| **%coverageSchedules.category%**: %coverageSchedules.type%  %if coverageSchedules.options%Type: %coverageSchedules.options%  %if coverageSchedules.replacementCost%Replacement cost: %coverageSchedules.replacementCost% | %coverageSchedules.subtype% | %coverageSchedules.deductible% | %coverageSchedules.coIns% | %coverageSchedules.limit% |

**AUTOMOBILE SCHEDULE**

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Item #** | **Unit #** | **Owner** | **Finance Co.** | **Year** | **Make** | **Model** | **Serial Number** | **Plate #** | **Colour** | **Date Added** | **Policy Expiry** |
| %autoSchedules.itemNumber% | %autoSchedules.unitNumber% | %autoSchedules.owner% | %autoSchedules.financeCompany% | %autoSchedules.year% | %autoSchedules.make% | %autoSchedules.model% | %autoSchedules.serialNumber% | %autoSchedules.plateNumber% | %autoSchedules.colour% | %autoSchedules.dateAdded% | %autoSchedules.policyExpiry% |

**PROPERTIES**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Type | Item # | Year | Make | Model | Serial Number/Description | Limit |
| %properties.type% | %properties.itemNumber% | %properties.year% | %properties.make% | %properties.model% | %properties.serialNumber%%properties.description% | %properties.limit% |