%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.claimType%, %claimsInfos.description% | %claimsInfos.amountPaid% | %claimsInfos.reserve% |

## PREVIOUS POLICY INFORMATION

|  |  |  |  |
| --- | --- | --- | --- |
| **INSURER** | **POLICY NUMBER** | **TYPE OF POLICY** | **TERM DATE – EXPIRY DATE** |
| %prevPolicyInfos.prevInsurer% | %prevPolicyInfos.prevPolicyNumber% | %prevPolicyInfos.prevPolicyType% | %prevPolicyInfos.prevTermStart% - %prevPolicyInfos.prevTermEnd% |

## 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** |
| %exposureOrReceipts.operationOrProductType% | %exposureOrReceipts.annualPercentOrDollar% | %exposureOrReceipts.changeFromLastYear% |

**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 #** | **ADDRESS** | **DESCRIPTION** | **RC** | **ACV** | **CO INSURANCE** | **RATE** | **PREMIUM** | | %buildings.locationNumber% | %buildings.buildingNumber% | %buildings.address% | %buildings.description% | %buildings.replacementCost% | %buildings.actualCashValue% | %buildings.coinsurance% | %buildings.rate% | %buildings.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: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** |

%locations.pageBreak|%

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

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

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

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

**SITE PLAN:**

|  |
| --- |
|  |

**SCOPE OF PROPERTY TO BE INSURED:**

%locations.scopeOfInsuredProperty%

## RISK INFORMATION

### GENERAL:

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

### CONSTRUCTION :

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

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

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

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

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

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

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

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

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

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

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

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

**RENOVATIONS:**

%locations.renovationsNoneKnown.yes%

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

### FIRE PROTECTION

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

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

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

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

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

### CRIME PROTECTION

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

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

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

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

### OCCUPANCY

|  |  |  |
| --- | --- | --- |
| **INSURED:** | %locations.occupancyInsured% | |
|  | |
| **OTHERS:** | %locations.occupancyOthers% | |

### EXPOSURES

%locations.exposuresClear.yes%

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

%locations.lossControlSurveys.pageBreak|%

ANNUAL LOSS CONTROL SURVEY **Performed by:** %locations.lossControlSurveys.surveyPerformedBy%

PREPARED FOR Date: %locations.lossControlSurveys.surveyDate%

%company% Person Interviewed: %locations.lossControlSurveys.surveyInterviewee%

Location: %locations.lossControlSurveys.locationNumber% Address: %locations.lossControlSurveys.locationAddress%

|  |  |  |  |
| --- | --- | --- | --- |
| Heating Cooling Systems | Yes | No | Comments |
| Has heating / cooling systems been serviced in past 12 months? | **%if locations.lossControlSurveys.surveyHeatingServiced.yes%x** | **%ifnot locations.lossControlSurveys.surveyHeatingServiced.yes%x** |  |
| Is there adequate clearance to combustibles? | **%if locations.lossControlSurveys.surveyCombClearance.yes%x** | **%ifnot locations.lossControlSurveys.surveyCombClearance.yes%x** |  |
| Any use of temporary heating device(s)? | **%if locations.lossControlSurveys.surveyTemporaryHeating.yes%x** | **%ifnot locations.lossControlSurveys.surveyTemporaryHeating.yes%x** |  |
| Electrical Systems |  |  |  |
| Any upgrades that we should be aware of? | **%if locations.lossControlSurveys.surveyElectricalUpgrades.yes%x** | **%ifnot locations.lossControlSurveys.surveyElectricalUpgrades.yes%x** | %locations.lossControlSurveys.surveyElectricalUpgradesComment|% |
| Any extension cords in use? | **%if locations.lossControlSurveys.surveyExtensionCords.yes%x** | **%ifnot locations.lossControlSurveys.surveyExtensionCords.yes%x** |  |
| Size of Service and on breakers? | **%if locations.lossControlSurveys.surveyService.yes%x** | **%ifnot locations.lossControlSurveys.surveyService.yes%x** | %locations.lossControlSurveys.surveyServiceComment|% |
| Wiring supported and in good condition | **%if locations.lossControlSurveys.surveyWiring.yes%x** | **%ifnot locations.lossControlSurveys.surveyWiring.yes%x** |  |
| Has thermo-graphic scan been performed? | **%if locations.lossControlSurveys.surveyThermScan.yes%x** | **%ifnot locations.lossControlSurveys.surveyThermScan.yes%x** |  |
| Housekeeping |  |  |  |
| Aisles free and clear of obstructions? | **%if locations.lossControlSurveys.surveyAislesClear.yes%x** | **%ifnot locations.lossControlSurveys.surveyAislesClear.yes%x** |  |
| Stock rooms organized and well lit? | **%if locations.lossControlSurveys.surveyStockRooms.yes%x** | **%ifnot locations.lossControlSurveys.surveyStockRooms.yes%x** |  |
| Cross dock clear and safe? | **%if locations.lossControlSurveys.surveyCrossDoc.yes%x** | **%ifnot locations.lossControlSurveys.surveyCrossDoc.yes%x** |  |
| Trash and pallets clear from building 50’? | **%if locations.lossControlSurveys.surveyTrashClear.yes%x** | **%ifnot locations.lossControlSurveys.surveyTrashClear.yes%x** |  |
| Well lit retail / traffic area free of trip hazards? | **%if locations.lossControlSurveys.surveyWellLit.yes%x** | **%ifnot locations.lossControlSurveys.surveyWellLit.yes%x** |  |
| Flammable or Combustible Storage |  |  |  |
| Describe any dispensing operations and related safety precautions? | **%if locations.lossControlSurveys.surveyDispensing.yes%x** | **%ifnot locations.lossControlSurveys.surveyDispensing.yes%x** | %locations.lossControlSurveys.surveyDispensingComment|% |
| Are proper storage of solvents and flammables present? | **%if locations.lossControlSurveys.surveySolventStorage.yes%x** | **%ifnot locations.lossControlSurveys.surveySolventStorage.yes%x** |  |
| Are there any refueling tanks on site? If yes describe. | **%if locations.lossControlSurveys.surveyRefueling.yes%x** | **%ifnot locations.lossControlSurveys.surveyRefueling.yes%x** | %locations.lossControlSurveys.surveyRefuelingComment|% |
| If there is refueling on site is there a disaster plan? | **%if locations.lossControlSurveys.surveyDisasterPlan.yes%x** | **%ifnot locations.lossControlSurveys.surveyDisasterPlan.yes%x** |  |
| Fire Protection Equipment |  |  |  |
| Distance to Fire Hall and type of fire hall? | **%if locations.lossControlSurveys.surveyFireHall.yes%x** | **%ifnot locations.lossControlSurveys.surveyFireHall.yes%x** | %locations.lossControlSurveys.surveyFireHallComment|% |
| Are there fire extinguishers present? Describe size and type. | **%if locations.lossControlSurveys.surveyFireExtinguishers.yes%x** | **%ifnot locations.lossControlSurveys.surveyFireExtinguishers.yes%x** | %locations.lossControlSurveys.surveyFireExtinguishersComment|% |
| Fire extinguishers serviced in last 12 months? By whom? | **%if locations.lossControlSurveys.surveyExtinguishersServiced.yes%x** | **%ifnot locations.lossControlSurveys.surveyExtinguishersServiced.yes%x** | %locations.lossControlSurveys.surveyExtinguishersServicedComment|% |
| Fire alarm panel free of trouble signs? | **%if locations.lossControlSurveys.surveyAlarmPanel.yes%x** | **%ifnot locations.lossControlSurveys.surveyAlarmPanel.yes%x** |  |
| Is there an automatic sprinkler? Describe history of testing. | **%if locations.lossControlSurveys.surveyAutomaticSprinkler.yes%x** | **%ifnot locations.lossControlSurveys.surveyAutomaticSprinkler.yes%x** | %locations.lossControlSurveys.surveyAutomaticSprinklerComment|% |
| Standpipe and hose tested and inspected last 12 months? | **%if locations.lossControlSurveys.surveyStandpipe.yes%x** | **%ifnot locations.lossControlSurveys.surveyStandpipe.yes%x** |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Physical Protection | Yes | No | Comments |
| Is there any perimeter fencing? | **%if locations.lossControlSurveys.surveyPerimeter.yes%x** | **%ifnot locations.lossControlSurveys.surveyPerimeter.yes%x** | %locations.lossControlSurveys.surveyPerimeterComment|% |
| Is exterior lighting adequate, present and working? | **%if locations.lossControlSurveys.surveyExteriorLighting.yes%x** | **%ifnot locations.lossControlSurveys.surveyExteriorLighting.yes%x** |  |
| Access points free of obstructions? | **%if locations.lossControlSurveys.surveyObstructions.yes%x** | **%ifnot locations.lossControlSurveys.surveyObstructions.yes%x** |  |
| Are doors, windows and locks adequate for exposure? | **%if locations.lossControlSurveys.surveyAdequateExposure.yes%x** | **%ifnot locations.lossControlSurveys.surveyAdequateExposure.yes%x** |  |
| Is there burglar resistant glass and or window (door) bars present? | **%if locations.lossControlSurveys.surveyBurglarResistant.yes%x** | **%ifnot locations.lossControlSurveys.surveyBurglarResistant.yes%x** |  |
|  |  |  |  |
| Alarm Protection |  |  |  |
| ULC Equipment:  %locations.lossControlSurveys.surveyULCEquipment% |  |  | Name of Alarm Company and Address:  %locations.lossControlSurveys.surveyAlarmCompany% |
| Does alarm system include heat, motion and smoke? | %if locations.lossControlSurveys.surveyHeatMotion.yes%x | %ifnot locations.lossControlSurveys.surveyHeatMotion.yes%x |  |
|  |  |  |  |
| Premises Liability Checklist |  |  |  |
| Do you hire snow removal? | **%if locations.lossControlSurveys.surveySnowRemoval.yes%x** | **%ifnot locations.lossControlSurveys.surveySnowRemoval.yes%x** |  |
| Do you gather certificates of insurance from any contractor that is doing work on your premises? | **%if locations.lossControlSurveys.surveyCertificates.yes%x** | **%ifnot locations.lossControlSurveys.surveyCertificates.yes%x** |  |
| How long do you keep those certificates on file? |  |  | %locations.lossControlSurveys.surveyCertificateFile|% |
| Could we have a copy of the certificate that your broker created for you? | **%if locations.lossControlSurveys.surveyCertificateCopy.yes%x** | **%ifnot locations.lossControlSurveys.surveyCertificateCopy.yes%x** |  |
| Do you have a slip and fall policy? | **%if locations.lossControlSurveys.surveySlipAndFall.yes%x** | **%ifnot locations.lossControlSurveys.surveySlipAndFall.yes%x** |  |
| May we see a copy of your disaster plan that your broker / agent helped you to prepare? | **%if locations.lossControlSurveys.surveyDisasterPlan.yes%x** | **%ifnot locations.lossControlSurveys.surveyDisasterPlan.yes%x** |  |
| Are all fire doors free and clear of obstructions? | **%if locations.lossControlSurveys.surveyFireDoors.yes%x** | **%ifnot locations.lossControlSurveys.surveyFireDoors.yes%x** |  |
| Are all fire exits properly identified? | **%if locations.lossControlSurveys.surveyFireExits.yes%x** | **%ifnot locations.lossControlSurveys.surveyFireExits.yes%x** |  |
| Are all fire exit doors operable (not chained or locked)? | **%if locations.lossControlSurveys.surveyFireExitsOperable.yes%x** | **%ifnot locations.lossControlSurveys.surveyFireExitsOperable.yes%x** |  |
| Are all employees trained in emergency evacuation procedures? | **%if locations.lossControlSurveys.surveyTrained.yes%x** | **%ifnot locations.lossControlSurveys.surveyTrained.yes%x** |  |
|  |  |  |  |
| Other / Notes |  |  |  |
| %locations.lossControlSurveys.surveyOther|% |  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

## SCHEDULE OF COVERAGES

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

**AUTOMOBILE SCHEDULES**

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

**EQUIPMENT SCHEDULES**

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

**MISCELLANEOUS SCHEDULES**

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

**DRIVERS**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Driver | Name | Licence Number | Date  Employed | Accidents | Convictions |
| %locations.drivers.driver% | %locations.drivers.name% | %locations.drivers.licenseNumber% | %locations.drivers.dateEmployed% | %locations.drivers.accidents% | %locations.drivers.convictions% |