

## Insurance Renewal Checklist

Renewal Date: \_\_\_\_\_

Policy Type: \_\_\_\_\_

### 45-60 Days Prior to Renewal

### Description

### Completed

#### **Update Certificate Holders List**

Update certificate of insurance list to include only applicable companies and provide to broker.

#### **Update Company Information**

Inform your representative of any new operations, businesses acquired or sold, new locations, etc.

#### **Update Exposures**

Review vehicle and driver schedules, mileage and revenue estimates, property and equipment values, payrolls, etc.

#### **Update Agreements & Contracts**

Make sure representative knows of any new customer contracts and/or independent contractor agreements, brokerage agreements, vehicle lease agreements, etc.

#### **Notes**

### Binding Tasks

### Description

### Completed

#### **MCS-90**

Obtain copy of MCS90 and keep on file somewhere you can retrieve quickly.

#### **BMC-91X Filing**

Confirm federal filing is done on the FMCSA website for the correct limit needed.

#### **State Filings**

Confirm all state specific Public Utility Commission, Intrastate Form E, etc. filings are done.

#### **Insurance Binders**

Binders of Insurance act as temporary proof of coverage until your policies are delivered.

#### **Insurance Policy**

Follow up for insurance policy 45 days after effective date.

#### **Certificates**

Make sure all customers get renewal certificates of insurance to not hold up any loading of your equipment.

#### **Auto ID Cards**

Obtain a copy to keep in the cab as well as a copy to keep on file in the office.

#### **Auto Forms**

Make sure all state specific coverage election forms (Uninsured Motorists, Underinsured Motorists, Personal Injury Protection or Firt Party Benefits, etc.) are all completed.

#### **Reporters**

Set up internal tasks for submitting monthly reporter information on policies billed this way.

#### **Payment**

Set up payment instructions for internal team including reporter information, due dates, etc.

#### **Notes**



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