

Commercial Lines Account Summary

___ Existing Account Review

___ New Account

Other Business		
PL	Life	Health

Date _____

Producer _____

Account Name _____ TAM Acct Code. _____

Mailing Address _____ Phone _____

Contact _____ Email _____ Fax _____

Business Description _____ FEIN _____

Entity: Corporation Partnership Sole Proprietor LLC Other _____

LOCATIONS

No.	Address	Coverage	Owned/ Leased	Number of Employees
		Bldg: _____		
		Contents: _____		
		BI: _____		
		Bldg: _____		
		Contents: _____		
		BI: _____		
		Bldg: _____		
		Contents: _____		
		BI: _____		

SPECIAL INSTRUCTIONS

CHECKLIST

	No Exposure	Accepted	Rejected		No Exposure	Accepted	Rejected
LIABILITY				BUSINESS AUTO			
Limits: \				Liability:			
Products/ Comp Ops				Med:			
Personal/ Ad Injury				UM/UIM:			
Med Pymnts:				Comp:			
Fire Damage:				Collision:			
Deductible: <input type="checkbox"/> BI <input type="checkbox"/> PD				Drive Other Car			
Liquor:				Hired/Non- Owned			
Professional				Towing			
Add'l Insured: #				OEM			
Garage				Auto + Endorsement			
Employee Dishonesty				Hired PD			
E & O				INLAND MARINE			
D & O				Scheduled Equipment			
EPLI				Small Tools			
EBL				Cargo			
Pollution				Installation Floater			
Storage Tank				EDP			
PROPERTY				Equipment Rented/			
<input type="checkbox"/> Basic <input type="checkbox"/> Broad <input type="checkbox"/> Special				Leased			
Blanket:				Equipment in Transit			
<input type="checkbox"/> RC <input type="checkbox"/> ACV				Signs			
Deductible:				CRIME			
Co-insurance				Employee Dishonesty			
Business Income/				Forgery/ Alteration			
Extra Expense				Monies/ Securities			
Inflation Guard:				Computer Fraud			
Property Enhancement				Theft			
Ordinance or Law				WORK COMP			
Agreed Value				Employer's Liability			
Signs/ Fence/ Poles				Other States			
Earthquake				Exclusions			
Water/ Sewer Backup				Deductible			
Flood				UMBRELLA			
Peak Season				Limit:			
Spoilage				Underling limits met			
Glass				Misc.			
Vacancy Issues				Bond			
Outdoor Property				Boiler & Machine			
Utility Services				Builders Risk			
Time Element							
Theft				Life			
Mechanical Breakdown				Health			
Valuable Papers				Benefits			
Money							