

Checklist Instructions:

Agent: The coverages listed below are suggested for consideration for financial institutions. After evaluating each of the listed coverages, check the recommended blank by those that apply specifically to this client. Make sure both the exposure and the coverage are explained to the client.

A brief coverage description is provided when you click on the coverage title.

Client: For each of the coverages that the agent has recommended, initial whether you have chosen to accept or reject that coverage in the blanks provided.

COVERAGE RECOMMENDATIONS

PROPERTY COVERAGES	Recommend	Accept	Reject	Not Applicable
Building and Personal Property Coverage Form				
Building				
Business Personal Property				
Personal Property of Others				
Improvements and Betterments				
Building and Personal Property Coinsurance				
Percentages None 80% 90% 100%				
Bldg _____				
BPP _____				
PPO _____				
I&B _____				
Alternatives to Coinsurance				
Agreed Value				
Functional Replacement Cost				
Peak Season				
Reporting Forms				
Other _____				
Optional Property Coverage Forms				
Builders Risk				
Commercial or Manufacturers Output Policy				
Condominium–Association Coverage				
Condominium–Unit-owners Coverage				
Equipment Breakdown				
Legal Liability				
Mortgageholders Error and Omissions				
Property Coverage Options				
Additional Debris Removal				
Ordinance or Law				
Outdoor Trees, Shrubs and Plants Enhancement				
Replacement Cost Valuation				
Utility Services–Direct Damage				

INLAND MARINE COVERAGES				
	Recommend	Accept	Reject	Not Applicable
Accounts Receivable				
Commercial Articles				
Difference In Conditions(DIC)				
Electronic Data Processing				
Fine Arts				
Miscellaneous				
Signs (Neon and Electric)				
Valuable Papers and Records				
Other Inland Marine Coverages				
CRIME COVERAGES				
	Recommend	Accept	Reject	Not Applicable
Money, Securities and Other Property				
Employee Dishonesty				
Computer and Funds Transfer Fraud				
Destruction of Electronic Data or Programs				
Extortion				
Forgery or Alterations				
Fraudulent Impersonation				
Kidnap and Ransom				
Lessees of Safe Deposit Boxes (Securities and Other Property only)				
Money Orders and Counterfeit Money				
Telephone Toll Fraud				
Unauthorized Reproduction of Computer Software by Employees				
Money and/or Securities Only				
Theft, Disappearance and Destruction				
Robbery and Safe Burglary				
Securities Deposited With Others				
Property Other Than Money and Securities				
Premises Burglary				
Premises Theft				
Robbery and Safe Burglary				
Other Crime Coverages				

LIABILITY COVERAGES				
	Recommend	Accept	Reject	Not Applicable
Commercial General Liability				
Occurrence Basis				
Claims-Made Basis				
Optional Liability Coverages				
Directors and Officers				
Employee Benefits				
Employment-related Practices				
Owners and Contractors Protective				
Special Events				
Other Liability Coverages				
PROFESSIONAL AND E&O LIABILITY COVERAGES				
COMMERCIAL AUTO COVERAGES				
	Recommend	Accept	Reject	Not Applicable
Liability				
Medical Payments				
Physical Damage				
Hired Car				
Nonownership Auto				
Personal Injury Protection (P.I.P.)/No-Fault				
Optional Automobile Coverages				
Garagekeepers				
Uninsured Motorists				
Underinsured Motorist				
Other Auto Coverages				
WORKERS COMPENSATION COVERAGES				
	Recommend	Accept	Reject	Not Applicable
Workers Compensation and Employers Liability				
Federal Employers Liability Act				
Stop Gap Employers Liability Coverage				

Voluntary Compensation				
Other Workers Compensation Endorsements				
EXCESS LIABILITY COVERAGES				
	Recommend	Accept	Reject	Not Applicable
Excess Liability Policy				
Umbrella Policy				
AVIATION COVERAGES				
Aircraft Passenger Liability				
Aircraft Policy				
SPECIALTY COVERAGES				
Cyber Insurance				
Fiduciary Liability Insurance				
International/Foreign Operations Insurance				
Media/Communication Liability				
Terrorism Insurance				
Title Insurance				
Unmanned Aerial Vehicles (UAV) (Drones)				
Weather Insurance				
Other Specialty Coverages				
BONDS				
Fiduciary Bond				
License and Permit Bond				
Other Bonds				
OTHER OPTIONS				

--	--	--	--	--

Comments

I certify that I have reviewed my coverage needs in accordance with this checklist with my agent and I have accepted or rejected the recommended coverages as indicated by my initials in the spaces above.

_____ Signature of Client _____ Date
_____ Title

I certify that I have reviewed the coverages outlined in this checklist with my client and that the initials of the client indicate the acceptance or rejection of the coverages recommended.

_____ Signature of Agent _____ Date