Agency documentation checklist

For our most competitive pricing, including our exceptional claims and customer service, please verify:

- ☐ **Owner of insured vehicle**
  - Only include vehicles owned by the named insured
- ☐ **Information on all drivers**
  - List or exclude (*exclusions vary by state*) anyone age 14 or older with regular access to the insured vehicle
- ☐ **Occupations of all drivers and if the vehicle(s) are used for acceptable business use**
- ☐ **All insured vehicles are garaged at the residency**
  - If insured moves or changes vehicles, notification must be provided within 14 days
  - If insured moves out of state, a new policy is required
- ☐ **Disclosure of all motor vehicle accidents or violations**
- ☐ **All selection/rejection forms are signed and dated**
- ☐ **All coverages were explained to the named insured**
  - Specialty policy types (such as Broad Form, Limited Liability or Named Non-Owner) can be a great fit. The acknowledgment forms highlight the differences (*policy types vary by state*)
  - Eligibility for Prior Insurance or Home Owners discounts—proof required (*discounts vary by state*)
- ☐ **Vehicles are inspected (*for Comprehensive and Collision coverage*)**
  - Photos or completed inspection form required

Documentation for your agency files (should be maintained for a minimum of seven years):

Signed and dated forms:

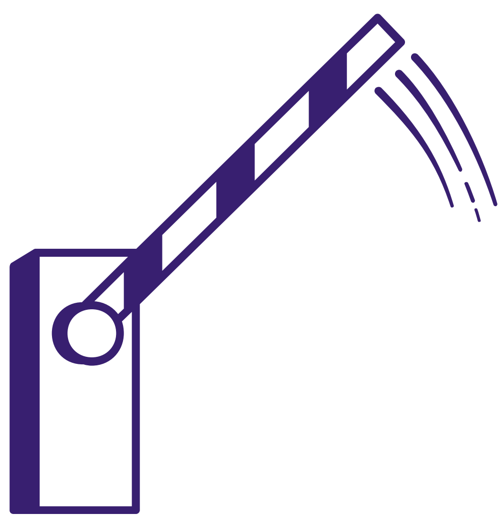
- ☐ Auto application
- ☐ Coverage selection/rejection forms
- ☐ Driver exclusion form, if applicable
- ☐ Acknowledgment forms, if applicable
- ☐ EFT authorization form, if applicable

Copy/Proof of:

- ☐ Driver's license or ID cards of all listed drivers
- ☐ Vehicle title or registration
- ☐ Prior insurance, if applicable
- ☐ Homeownership, if applicable
- ☐ Not-at-fault accidents, if applicable

Record of:

- ☐ Any payments taken (date, time, amount)
- ☐ Any endorsement requests made (date, time, detail of request)
- ☐ Vehicle inspections or digital photos of vehicle (*for Comprehensive and Collision coverage*)



M20060 10/22