



## **Human Service Organization Underwriting Data Checklist**

In order for us to customize protection for your organization, we will need the following:

- 1 Annual Report, if available.
- 2 Annual projected payroll for the upcoming year.
- 3 Most recent audited financial statement and copy of the organization's by-laws.
- 4 Vehicle information including Make, Model, VIN # and Usage and Seating Capacity of any owned vehicles. A complete list of authorized drivers with accompanying date of birth, drivers license number.
- 5 Values of all property. This should include buildings, business contents, computer equipment and the like. Information on protective fire devices such as smoke/fire alarms, fire extinguishers, emergency lighting, sprinkler systems, etc. is essential to give you the maximum credits allowable.
- 6 Loss information provided by the current insurance companies. Quoting companies like to see the last 3 years of claim information but this may not be available. In lieu of actual claim data, your letter describing incidents/claims is acceptable.
- 7 Any other information specific to "loss control" measures that your organization has in place. For example employment practices, vehicle maintenance programs, accreditation or association affiliations and anything that displays the high level of service that you offer to your clients and customers.
- 8 Copies of contracts between your organization and your landlord if building(s) are not owned but you are required to carry insurance.

If you would like us to evaluate your current insurance protection and provide your board with a comparison on the level of protection and relative cost, it will be necessary for us to have copies of the insurance contracts that are currently in place.

You may always feel welcome to contact our offices at any time with questions you may have.

**P.O. Box 63  
Weatogue, CT 06089  
(860) 844-8288 ~ Toll Free (888) 845-8288  
Fax (860) 844-8274  
Info@neisinc.com**