



Fleet Underwriting Checklist

General Agent: _____

Fleet: _____ City, State: _____

Expiration Date: _____ Proposed Effective Date: _____ Date Quote Requested: _____

Are you the incumbent broker: Yes No

To underwrite this application, the following materials must be provided and attached to the application:

_____ 1. Loss Runs: please provide company loss runs for the current, and three prior years, currently valued within the last 60 days, for all lines of coverage requested. Please note that current and 5 prior years will be needed if coverage requested is in excess of \$1 million. Provide details on all losses in excess of \$50,000.

_____ 2. Exposure History: please provide the following exposure summary.

	# Power Units	Mileage	Revenue
Projected Year			
Current Year			
1st Prior Year			
2nd Prior Year			
3rd Prior Year			

_____ 3. Fuel Tax Reports: please provide fuel tax reports (IFTAs) for the most recent 8 quarters.

_____ 4. Financials: financials are not required with a submission but may be requested by a Canal Underwriter.

_____ 5. Equipment Schedule: attach current listing of all owned and owner operator vehicles/equipment, including year, make, VIN, stated values, gross vehicle weight, and state licensed.

_____ 6. Drivers List: attach current list of all drivers operating equipment - list should include full name of driver, date of birth, state licensed, driver's license number, date of hire, and years of CDL experience.

_____ 7. Hiring Standards: attach copy of hiring standards, including MVR requirements.

_____ 8. Motor Vehicle Reports: MVRs must be currently valued within the last 90 days.
11 to 24 power units – all driver MVRs required
25 – 50 power units – 40% MVR random sample required
51 units or more – 30% MVR random sample required

_____ 9. Copy of appropriate non-resident agent license. This applies only to the 1st submission of a Fleet account in any "non-resident" state.