



Fleet Underwriting Checklist

General Agent: _____ Name of Risk _____

Are you the incumbent broker: Yes ____ No ____

To underwrite this application, the following materials must be provided and attached to a truck 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 five prior years will be needed if coverage requested is in excess of \$1 million. Provide details on all losses in excess of \$100,000.

_____ **2) Fuel Tax Reports:** please provide fuel tax reports (IFTAs) for the most recent 8 quarters.

_____ **3) 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.

_____ **4) 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.

_____ **5) Hiring and Safety Standards:** attach copy of hiring and safety standards, including MVR requirements.

_____ **6) 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

_____ **7) Copy of Appropriate Non-Resident Agent License.** This applies only to the 1st submission of a Fleet account in any “non-resident” state.