

Commercial Lines Quote Worksheet

1. Name of Business:
2. Insureds Name
3. DBA:
4. Entity:
5. Mailing address
6. Phone number
7. Contact Email

8. Detailed business operations:
9. Year business started:
10. Annual sales (receipts):
11. Annual payroll
12. Number of employees

13. Value of Business Personal Property:

14. Building value
15. Construction of location:
16. Square footage
17. Number of stories
18. Burglar alarm?
19. Fire alarm?
20. Building sprinklered?
21. Number of occupants
22. Do employees use their own vehicles for business errands?
23. Prior carrier
24. Losses
25. Copy loss runs if possible.

Workers Comp:

1. FEIN #
2. # of part time employees:
3. # of full time employees:
4. Annual payroll:
5. Names and date of birth of all officers/owners:
6. Copy of current WC PAYROLL/CODE section

Business Auto:

1. Vin # of all vehicles:
2. Copies of drivers license for all drivers
3. Mileage range:
4. Trucking long haul or local

Restaurants

1. Dance floor
2. Entertainment
3. Bar
4. Liquor percentage of receipts
5. Delivery
6. Business Personal Property

Additional questions may be required depending on type of business.
The above questions are basic questions.