



## Payroll Partner Bind Checklist

The following information must be provided for the policy to be issued:

Required Documents:

- loss runs, bureau experience mod worksheet or risk reports, valued within 90 days  
*If your client meets all of the following criteria, you can submit a no-loss letter instead of loss runs:*
  - [Preferred class codes](#)
  - No losses in past 3 years
  - Premium under \$20K

Officer Forms:

- Officer inclusion/exclusion form for each company officer with percentage of ownership  
*If no form is received, Pie will bind with state defaults*

Insured's Contact Information

- First and last name
- FEIN
- Mailing address
- Physical address(es)
- Email address

For California entities only (must be answered or will not be filed):

- Is a DMV cert required?
- If a PUC or CSLB filing is required, list the entity's ID number: