

Workers' comp binding checklist.



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

- Information for each officer:
 - *Full name*
 - *Include/exclude status*
 - *Percentage of ownership - must add up to 100%*

- Insured's contact information
 - *Full name*
 - *Phone number*
 - *FEIN*
 - *Installment plan (monthly, quarterly, semi-annual, full pay or pay as you go)*
 - *Mailing address*
 - *Physical address(es)*
 - *Email address (This cannot be the agent or sub-agent's information)*

- Required documents:
 - *Signed officer inclusion/exclusion form for each company officer as applicable If no form is received, Pie will bind with state defaults.*
 - *Loss runs confirming coverage and claims history as quoted in the partner portal 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 \$40K*
 - *Florida policies require a signed ACORD 130 per state law*

- All subjectivities stipulated by the underwriter

- 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*