



Partner 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 \$20K
 - 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