



BRITT/PAULK

COMMERCIAL FLEET UNDERWRITING CHECKLIST

To process this application, the following documents must be provided and attached:

- _____ 1. **LOSS RUNS:** Last (5) years of documented loss runs from prior insurance companies for all coverages requested. Losses to be valued within the last 90 days. Details required on all losses in excess of \$50,000.
- _____ 2. **FINANCIAL STATEMENTS:** Last (2) years independently prepared financial statements and current interim statement, preferably audited or reviewed statements. Include revenue through trip lease and/or brokerage operations, if any. If the most recent year-end statement is more than 6 months old, an interim statement must be provided. Parent company financials, if applicable, should also be provided.
- _____ 3. **EXPOSURE DATA:** Last (5) years of total gross receipts, total mileage and average power unit counts for each year.
- _____ 4. **MILEAGE BY STATE:** Provide copies of International Fuel Tax Administration Schedule B reports or similar data indicating mileage by state and total mileage for the last (4) quarters.
- _____ 5. **SAFETY:** Provide copy of most recent state or federal compliance review report and current safety rating notice (both sides of document). Also, provide copies of fleet safety and maintenance programs.
- _____ 6. **DRIVERS LIST:** Provide listing of all drivers: company, owner/operators, service and private passenger units, showing full name, date of birth, state of license, driver's license number, seniority/date of hire and most recent motor vehicle reports (MVRs).
- _____ 7. **EQUIPMENT LIST:** Provide list identifying company-owned vehicles and owner/operator vehicles. Include year, make, model, VIN (last 5 digits), current market value and garage location. For local and intermediate units (up to 300 mi. radius), please provide Gross Vehicle Weight.
- _____ 8. **AGREEMENTS:** Provide copies of permanent lease and trip lease agreements. Also, provide copies of hold-harmless, interline, interchange, intermodal and sub-hauler agreements, if any.
- _____ 9. **OPERATING AUTHORITY:** Provide copies of all operating authorities.

BRITT/PAULK Insurance Agency, Inc.

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