



Excess Liability / Umbrella Application

Insured's Name:
dba:
Physical Address:
Total Number of Employees:
Sales/Business Income: \$
Year Established:

Effective Date	
Umbrella Limit Desired	
Are all underlying policies (except EBL) on an Occurrence form?	Y/N
Does the Insured have a formal Safety Program in place?	Y/N
Are all underlying Auto and GL policies written with defense costs outside the Limit of Liab and unlimited?	Y/N
Is there a separate Garage Liab policy?	Y/N
Waive Auto Liab coverage?	Y/N
Waive Employee Benefits Liab?	Y/N
Waive Liquor Liab Coverage?	Y/N
Waive Employers Liab or has WC act been rejected by Insured in any state?	Y/N

Underlying Auto Questions

Carrier Name & A.M. Best/ Standard & Poor's Rating (Must be A-7 or better)	
Limit of Liability	
Policy Effective Date	
Are there additional AL underlying carriers?	Y/N
Automobile Fleet Breakout:	
<ul style="list-style-type: none"> ▪ Private Passenger Vehicles (including hired and non-owned) ▪ Light Trucks 0-10,000 lbs (including 1-8 passenger vans) ▪ Medium Trucks 10,000-20,000 lbs (including 9-20 passenger vans) ▪ Heavy Trucks 20,001-45,000 lbs (units not for hire) ▪ Extra Heavy Trucks and Tractors (Short Haul) over 45,000 lbs (units not for hire) ▪ Buses (over 20 passengers only) 	
Does the fleet contain any of the following exposures? Delivery including: School Buses or Vans, Hospitality or Shuttle Vans, Limousines, Taxis, Rapid Delivery Operations, Gasoline Hauling, Hazardous Waste/Red Label or Commodity III or IV Hauling?	Y/N

Britt/Paulk Insurance

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Underlying GL Questions

Carrier Name & A.M. Best/ Standard & Poor's Rating (Must be A-7 or better)	
Is the GL policy written with an ISO form CG0001 or equivalent?	Y/N
Does the GL include Hired & Non-owned Auto coverage?	Y/N
Hired and Non-owned Auto Limit	
Will Hired and Non-owned auto losses erode any GL aggregate?	Y/N
Does the Insured have employees using their own vehicles on company business on a regular basis?	Y/N
Per Occurrence Limit	
General Aggregate Limit	
Are Products Completed Operations included in General Aggregate?	Y/N
Products & Completed Ops. Aggregate Limit	
Per Project General Aggregate	
Per Location General Aggregate	
Do the limits above include an excess or umbrella policy?	Y/N
Primary GL Premium (not including premium for terrorism)	
Policy Effective Date	
Is the primary GL written with a deductible which is greater than \$25,000?	Y/N

Employers Liability Questions

Carrier Name & A.M. Best/ Standard & Poor's Rating (Must be A-7 or better)	
Applicable state	
WC Bureau or NCCI or, if Stop Gap state, ISO form?	Y/N
Limit of Liab:	
Bodily injury by accident	
Bodily injury by disease (each employee)	
Bodily injury by disease (policy limits)	
Policy Effective Date	
Does the EL coverage contain FELA, Jones Act, USL&H and/or Maritime?	
Are there any additional EL carriers?	Y/N

Miscellaneous Coverages

Select any that apply

Not Applicable	
Watercraft Liab	
Marine Liab	
Aircraft Liab	
Railroad Liab	

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Charterers Liab	
Wharfingers Liab	
Terminal Operators Liab	
Druggists Liab	
Miscellaneous Professional Liab	
Other	

Loss History

Please provide the loss information for the past 5 years:

	Year	# of Claims	Total \$	Valuation Date
General Liability	2008			
	2007			
	2006			
	2005			
	2004			
Auto Liability	2008			
	2007			
	2006			
	2005			
	2004			
Other	2008			
	2007			
	2006			
	2005			
	2004			

Additional Questions

Does the current insurance program include a Lead Umbrella and do you want Excess Liab coverage over Lead Umbrella?	Y/N
Please provide a brief description of all of the insured's operations (3,500 character max):	
Do they have any ownership interest in other named insureds or other subsidiary companies?	Y/N
Any sales outside the US?	Y/N
Does the primary contain any sub-limits less than \$1,000,000 (other than Medical payments or Fire Legal)?	Y/N
Please select any applicable sub-limit(s):	
Assault & Battery	
Sexual Molestation	
Pollution	
Liquor	
Other	