

Information Checklist for McGowan Risk Specialists

Are you the incumbent controlling broker on this account
Describe Occupancy
• Expiring Carriers
Expiring Premiums by Line of Coverage
• Expiring TIV
Expiring AOP and wind deductibles
Submission/Renewal TIV
Needed premium by line of coverage for the Bind Order
• Is Incumbent offering renewal
Markets approached
Any other wholesalers working this
Can agent provide BOR for any needed markets
Loss summary for the past 5 years
Do apps and SOV include updated Bldg COPE info
Describe any fire or burglary protection
Is premises sprinklered (if so, type and in working order?)
Is NFIP or XS flood requested (if so, provide flood zone and EC)