



# Auto Checklist

<b>Insured</b>		<b>Effective Date:</b>	
<b>Personal Auto Insurance</b>		<b>Producer Code:</b>	
	Meets all the underwriting guidelines set by insurer.		
	Dully completed & Signed Auto Application by all the owners.		
	Auto plus & MVR of all the drivers and note in remarks section		
	Dully completed and signed Payment Authorization Form		
	Vehicle ownership of all the vehicles.		
	Bill of Sale		
	Privacy Consent form		
	Copy of Quote		
	Client Profile		
	Driver's Training Certificate		
	Declination of optional accident benefits form		
	Disclosure and Declination of coverage		
	Claims and conviction section initialized by all named insured.		
	Confirmation there is no other driver in household if YES insurance details, relationship etc		
	Notes are added to Power Broker for pending documents, other notes		
	Vehicle Pictures		
	<b>Safety Certificate</b> - if required as per insurer.Note on file		
	<b>OPCF 43:</b> Confirm KM at time of delivery, if vehicle was new/used/demo, date of purchase		

- Any Handwritten info on application needs to be initialized by insured and updated in power broker.
- Class 01 and Class 07 needs to be clearly explained in remarks.

**Office Notes:**

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 Producer Name & Signature

- Make sure meets our internal u/w guidelines and is per-approved.