MONTRIDGE INSURANCE SERVICES, INC.

Client Contract & Insurance Checklist

Compare each client request with the actual policy language and agreed work.

Contract and scope

Identify entities, version, sites, duties and effective dates.

Insurance exhibit

List requested lines, limits, rating or evidence requirements.

Coverage evidence

Compare policy and endorsement language with each request.

Status and protections

Review additional insured, alternate employer and any waiver requests.

Indemnity and duties

Flag defense, indemnity and reassignment clauses for legal review.

Discrepancies and decision

Assign owners, record changes and keep the final written evidence.

Save a local copy. Keep completed records in your organization's approved system.