Year after year, the needs of your business change. And with those changes, your insurance needs may change as well. Whether you run a restaurant, a law firm or a manufacturing company, there are common pieces of information every business should have on hand when meeting with your independent agent or broker. This checklist is an example of some important information that will help you and your agent determine any necessary adjustments to your current business insurance program to ensure your business is covered properly, now and into the future.

**Checklist**

- A copy of last year’s policy
- Recent property appraisals
- List of property or building improvement projects – life safety code updates, green building materials, roofing, etc.
- List of recent property investments – computer/network equipment, mobile equipment, fine arts/signage, etc.
- Values of in-stock, reserve or stored materials
- Employee count and work assignment – full-time versus part-time
- List of company’s directors and officers
- Descriptions of safety programs
- Insurance carrier’s risk control recommendations – based on operations/facility survey
- Number of individuals/clients for whom you maintain records containing sensitive, private or other confidential information
- List of company names and office locations for vendors and suppliers
- Sales figures – online versus offline
- Number of owned autos
- Planned international business expansion or travel
- Planned joint ventures or partnerships
- Planned new product development or service offering

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We work with your independent agent to identify insurance solutions so you can focus on what matters most. Our leading loss prevention and claim services go beyond what other carriers offer, and our breadth and depth of coverages are why we serve more than one million businesses and professionals. When you’re looking for reliable business insurance from a carrier rated “A” by A.M. Best for financial strength … we can show you more.*

For more information, contact your independent agent or visit www.cna.com.

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