

# Things to think about before talking to your agent or broker.



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SMALL BUSINESS

Year after year, the needs of your business change. And with those changes, your insurance needs may change as well. Whether you run a technology company, a law firm or a graphic arts studio, there are common pieces of information every business should have on hand when meeting with your independent agent or broker. This checklist provides examples of important information that will help you and your agent determine any necessary adjustments to your current business insurance program; ensuring 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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