



INSURANCE AGENCY, INC.
PRIMARY / EXCESS AND SURPLUS LINES BROKERS
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SUBMISSION CHECKLIST

NON PROFIT D&O

- Fully completed, dated & signed Non Profit D&O application
- Detailed description of operations, or if available, provide a brochure / website for the entity
- Provide one of the following (D&O is rated off of asset size and salaries, in addition to other criteria like class of business)
 - IRS Form 990
 - Budget
 - Latest Audited Financials
- A description of any prior losses, amounts paid or reserved
- Current carrier expiring premium, if applicable

Non Profit D&O – Additional Information

If the account is bound, the original signed & dated company application must be submitted as it becomes part of the policy form.

Written on a Claims Made Basis.