



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

EXCESS / UMBRELLA COVERAGE:

- Completed Application, including the general information section
- Detailed description of each Named Insured and operations of each
- 4 / 5 Year Currently Valued Loss History Aggregated by Year and by Underlying coverage and a detailed description of all losses over \$25,000 for GL and AL lines.
- Payroll, Subcontractor cost, gross receipts
- Number of vehicles by Class, radius and use
- Gross Vehicle Weight for each Medium and heavier vehicles
- Minimum UL Limit requirements are 1MM/2MM/1MM GL, 1MM CSL AL and 5/5/5 EL, advise premiums
- Underlying insurance to included: terms and conditions, lines of business, limits, how aggregate applies, coverage type, - occurrence or claims made, and defense costs inside or outside of the limit
- Underlying carrier and premiums for ALL lines.
- For risks with # of vehicles over 10, please provide brief summary:
 - Driver Hiring Practice info (i.e. who checks MVR's, any drug testing, safety meetings held, etc... we don't need copies of manuals)
 - Vehicle Maintenance procedures
- Need Attached supplement completed or Equivalent