



FLEET SUBMISSION CHECKLIST (< 100 units)

ACCOUNT NAME: _____

EFFECTIVE DATE: ____ / ____ / ____

Required information – The following information is required to complete an evaluation and process a quotation. Please provide 30 days prior to effective date.

- ___ **A Sentry Fleet application** with all questions and information completed. Also include the haz mat and OS/OW supplemental applications if applicable.
- ___ **Equipment list** Include all owned and leased equipment. For physical damage, include the value for each piece of equipment. We don't write private passenger autos. All units that are not tractor/trailers need the G.V.W. and a description of purpose.
- ___ **Driver list** Include CDL #, age, hire date, and years experience for each driver. A summary of violations and accidents for each driver is encouraged.
- ___ **MVRs** (no more than six months old) or summary of violations if MVRs are not available.
- ___ **IFTA (International Fuel Tax Agreement) quarterly reports** for most recent 12 Months. Summaries are not acceptable to determine mileage reporting basis.
- ___ **Loss Runs** Include *currently valued* loss runs (run date no older than 90 days) for the most recent four years for each line of coverage requested. Include the 5th year for primary and 5 years of excess loss runs when requesting excess liability limits. Provide detailed descriptions of all losses that exceed \$25,000.
- ___ **Financial statements** Most recent year-end balance sheet and income statement, plus interim statements if annuals are older than 6 months old.

Recommended Information

- Cover letter explaining any issues or unique exposures.
- Copy of written safety manual.
- Copy of any passenger rider policy.



LARGE FLEET SUBMISSION CHECKLIST (>100 units)

ACCOUNT NAME: _____

EFFECTIVE DATE: ____ / ____ / ____

Required information – The following information is required to complete an evaluation and process a quotation. Please provide 60 days prior to effective date.

___ **A Sentry Fleet application** with all questions and information completed. Also include the haz mat and OS/OW supplemental applications if applicable.

___ **Equipment list** Include all owned and leased equipment. For physical damage, include the value for each piece of equipment. We don't write private passenger autos. All units that are not tractor/trailers need the G.V.W. and a description of purpose.

___ **Driver list** Include CDL #, age, hire date, and years experience for each driver. A summary of violations and accidents for each driver is encouraged.

___ **MVRs** Your underwriter will identify which MVRs will be required for a sampling.

___ **IFTA (International Fuel Tax Agreement) quarterly reports** for most recent 12 Months. Summaries are not acceptable to determine mileage reporting basis.

___ **Loss Runs** Include *currently valued* loss runs (run date no older than 90 days) for the most recent 5 years for each line of coverage requested. Also include 5 years of excess loss runs when requesting excess liability limits. Provide detailed descriptions of all losses that exceed \$25,000.

___ **Financial statements** Audited most recent 2 years on a comparative basis to include balance sheet, income statements, statement of cash flows and the notes to the financial statement. If statements are over 6 months old, interim financial statements are needed.

___ **Accident Registry** Include **all** claims paid under the deductible and the actual dollar amounts.

Recommended Information

- Cover letter explaining any issues or unique exposures.
- Summary of losses by line.
- Copy of written safety manual.
- Copy of any passenger rider policy.