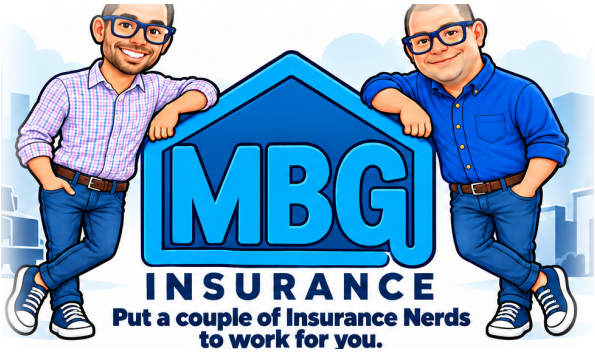


FREE QUOTE PREP CHECKLIST

Commercial Insurance Quote Checklist

Gather what you can before you call. The more complete your information, the faster we can shop your coverage across multiple carriers and get you accurate pricing. **Missing a few items? Call anyway.** We'll help you fill in the gaps.

1 Business Basics

- ☐ Legal business name and entity type (LLC, corporation, sole proprietor)
- ☐ Physical and mailing addresses
- ☐ FEIN (federal tax ID number)
- ☐ Years in business and owners' industry experience

2 Revenue, Payroll & People

- ☐ Estimated annual revenue (next 12 months and last year)
- ☐ Annual payroll, split by type of work
- ☐ Number of full-time and part-time employees
- ☐ Amount paid to subcontractors

3 Vehicles & Drivers

- ☐ Year, make, model and VIN for each vehicle and trailer
- ☐ Who each vehicle is titled to (business or personal)
- ☐ Driver names, dates of birth and license numbers
- ☐ How far you typically travel from your home base

4 Equipment & Property

- ☐ List of equipment with make, model, serial number and value
- ☐ Small tools total value
- ☐ Leased or rented equipment you're responsible for
- ☐ Building and contents values for owned or leased space

5 Insurance History

- ☐ Current policy declarations pages
- ☐ 3–5 years of loss runs (claims history) from your carriers
- ☐ Current policy expiration dates
- ☐ Details on any open or recent claims

Call the Office Nearest You

Springfield, MO **(417) 773-7822**
2100 S Brentwood Blvd, Ste B, Springfield, MO 65804

Oak Grove, MO **(816) 690-2640**
1200 S Broadway, Oak Grove, MO 64075

Bentonville, AR **(479) 350-6862**
1202 NE McClain Rd, Ste 153, Bentonville, AR 72712

Nerd tip: Loss runs often make the biggest difference in pricing. Request them from your current carrier or agent early, since some carriers take a week or more to send them.

Ready for a quote? Let's talk.

Independent agency. Dozens of carriers. Live people in our offices.

millenniumbrokers.com

support@millenniumbrokers.com

MBG Insurance writes commercial insurance in Missouri, Arkansas, Kansas and Texas. Coverage subject to carrier underwriting and approval.