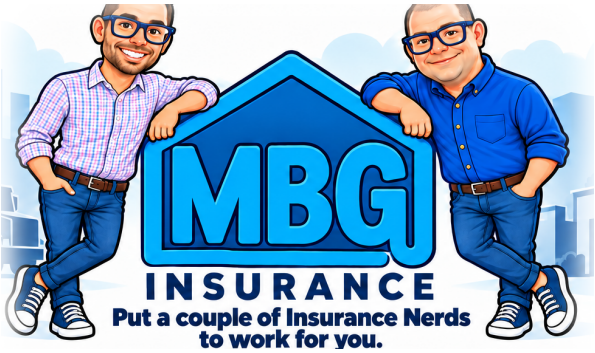


TREE CARE QUOTE PREP CHECKLIST

Tree Trimmer & Arborist Insurance Checklist

Tree care is one of the toughest risks to place, and carriers want details. Page 1 is what to gather. Page 2 is what underwriters will ask. **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, plus website
- ☐ Years in business under current management
- ☐ Number of active owners, officers or partners
- ☐ States where you do work

2 Employees & Credentials

- ☐ Number of full-time employees, including owners and officers
- ☐ Number of part-time employees
- ☐ Names and credentials of your arborists (ISA Certified, etc.)
- ☐ Description of arborist services you provide
- ☐ Crane operator certifications, if you use cranes

3 Services You Provide & Annual Payroll for Each

*Check every service you offer and estimate annual payroll for each, **not including the owner's salary**. Include occasional work.*

☐ Arborist services	$ _____	☐ Lawn care	$ _____
☐ Tree trimming	$ _____	☐ Landscaping	$ _____
☐ Tree removal	$ _____	☐ Snow removal	$ _____
☐ Stump grinding	$ _____	☐ Subcontractor costs	$ _____

4 Vehicles & Drivers

- ☐ Year, make, model and VIN for bucket trucks, chip trucks, dump trucks and pickups
- ☐ Trailers, including what each one hauls
- ☐ Driver names, dates of birth and license numbers
- ☐ Who each vehicle is titled to (business or personal)
- ☐ How far you typically travel from your home base

5 Equipment

- ☐ Chippers, stump grinders, skid steers and loaders with make, model, serial number and value
- ☐ Total value of saws, climbing and rigging gear
- ☐ Owned cranes: year, make, model, max height, lifting capacity and a photo of each
- ☐ Equipment you lease or rent from others

Nerd tip: A truck with a permanently mounted bucket built only to lift a worker generally isn't treated as a crane. If you're not sure how your equipment is classified, ask us before you fill anything out.

Ready for a quote? Let's talk.

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

millenniumbrokers.com
support@millenniumbrokers.com

TREE TRIMMER & ARBORIST INSURANCE CHECKLIST

Questions Underwriters Will Ask

Think through these before we talk. Honest, complete answers help us place you with the right carrier the first time and protect your coverage if you ever have a claim.

6 Your Operations

	YES	NO
Do you work around power lines for utility companies or government entities?	☐	☐
Do you do any work for railroad companies?	☐	☐
Do you use pesticides or herbicides?	☐	☐
If yes, what type and how often? _____		
Do you do snow plowing? Do you plow any city streets or highways?	☐	☐
If you need the plow covered: year, make, model and value: _____		

7 Cranes & Equipment Rental

	YES	NO
Do you use cranes in your operations?	☐	☐
Do you lease or rent cranes from others? With or without an operator?	☐	☐
How often do you use them, and for what? _____		
Are all of your crane operators certified?	☐	☐
Do you lease or rent your cranes or equipment to others?	☐	☐
With or without an operator, about how many days a year, and for what work? _____		

8 Subcontractors & Contracts

	YES	NO
Do you get certificates from your subcontractors showing liability limits at least equal to yours and naming you as an additional insured?	☐	☐
Do your contracts make you responsible for anyone else's liability (hold harmless or indemnification wording)?	☐	☐
Do you use a written contract with your customers?	☐	☐
If yes, send us a copy: _____		

9 Documents to Send With Your Request

- ☐ 5 years of loss runs (claims history)
- ☐ Current policy declarations pages
- ☐ A copy of the contract you use with customers
- ☐ Rental or lease agreements, if you rent equipment to others
- ☐ Photos of any cranes you own

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

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