

# SERVICES CHECK LIST

## PERSONAL LINES

- Auto Insurance
- Homeowners
- Personal Umbrella
- Rec. Vehicle/Boat
- Earthquake
- Employment Practices Liability (EPLI)
- Valuable Items (Jewelry/ Art / etc.)

## LIFE& HEALTH

- Individual Life Insurance
- Individual & Family Health Plans
- Key Employee Plans
- Group Health & Benefits

## RETIREMENT PLANS

- 401(k) Plans
- Profit Sharing Plans
- IRAs

## COMMERCIAL LINES

- Package Policy
- Umbrella
- Workers Compensation
- Commercial Auto
- Bonds
- Professional Liability
- Director & Officers Liability
- Employment Practices Liability (EPLI)
- Boiler & Machinery
- Commercial Earthquake
- Employee Benefit Plan Liability (EBL)
- CyberLiability/Internet Insurance

## ESTATE PLANNING

- Financial Planning
- Estate Tax Reduction
- Charitable Trusts

## OTHER SERVICES

- Annual Risk Survey
- Loss Control Audits
- 24 Hour Claims Hotline
- HR Management

This checklist was reviewed this \_\_\_\_\_ day of \_\_\_\_\_

\_\_\_\_\_  
AGENCY REPRESENTATIVE

\_\_\_\_\_  
CLIENT SIGNATURE



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