

# Canal Fleet Submission Checklist

General Agency: \_\_\_\_\_

Retail Agency: \_\_\_\_\_

Retail Agency Producer's Name: \_\_\_\_\_

Expiring Pricing: \_\_\_\_\_ Target Pricing: \_\_\_\_\_

Proposed Effective Date: \_\_\_\_\_ Quote Indication Need By Date: \_\_\_\_\_

Coverages requested:  AL  Cargo  PD  Other: \_\_\_\_\_

If you are not requesting a PD quote, who currently has that coverage? \_\_\_\_\_

Are you interested in obtaining a Canal PD quote?  Yes  No, If no, please explain: \_\_\_\_\_

## To obtain a pricing indication, please provide the following information:

- Completed Application – Canal's fleet app or a comparable fleet insurer or agent transportation (no Acord application will be accepted).
- Equipment List – including the year, make and model. If requesting physical damage, please include the stated value for each vehicle (prefer an excel document).
- Historical Unit Count/Mileage – current year plus 3 prior years and projected count or mileage.
- Current Driver's List – include the driver's name, DOB, DOH and CDL experience (prefer an excel document).
- Loss Runs – must be obtained within the last 90 days and must include the current year plus the 3 previous years (4 years total).
- Loss Summary – include number of claims and incurred totals, valuation date, details for losses over \$100,000 and carrier name.
- Brief Account Summary.

## To obtain a full quote, please provide the additional information listed below:

- IFTAs – last 4 quarters.
- Safety & Hiring – please provide information pertaining to the risk's safety and hiring guidelines.
- VINs – a complete list of VINs for all vehicles.
- MVRs – Motor Vehicle Records sampling:
  - 16-50 Power Units – 100% of MVRs
  - 51 & up Power Units – 50% of MVRs
- Financials (26+ Power Units) – include balance sheets, income statement and auditor notes, if available.
- Provide any additional information that will assist the underwriter in accurate pricing.

