



# **WHAT IS NEEDED to create a CERTIFICATE OF INSURANCE**

## **INFORMATION NEEDED:**

- ✓ **CERTIFICATE HOLDERS FULL NAME AND ADDRESS**
- ✓ **HOW DO THEY NEED TO BE LISTED ON THE COI SPECIFICALLY**
- ✓ **IS THERE ANY SPECIAL WORDING THAT NEEDS TO BE INCLUDED?**
- ✓ **DO THEY HAVE A SAMPLE OF WHAT THEY NEED THE CERTIFICATE TO READ LIKE?**
- ✓ **ANY ADDITIONAL SPECIAL INSTRUCTIONS THAT WE NEED TO KNOW?**

**AS  
CONTRACTS  
BECOME  
INCREASINGLY  
COMPLEX  
AND DETAILED,  
IT'S CRUCIAL  
FOR YOU  
AND YOUR  
AGENT  
TO BE  
PREPARED TO  
MANAGE  
THEM**

**THERE COULD BE ADDITIONAL INFORMATION THAT IS NEEDED. SOME COI'S ARE SIMPLE AND SOME ARE VERY COMPLICATED. HAVING THIS INFORMATION ABOVE AT THE START CAN MAKE THE PROCESS SO MUCH EASIER AND MORE EFFICIENT**

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