Checklist
Paper Policy Preparation

Documents to be submitted immediately after closing

- ☐ → Copy of Policy(ies) being issued
- ☐ → Copy of any Endorsement(s) being issued
- ☐ → Worksheet

Information to be placed on Worksheet and Policy

- ☐ → Member Number
- ☐ → Fund Policy Number
- ☐ → Your Office File Reference Number

Information to be placed on Check

- ☐ → Fund Policy Number
- ☐ → Your Office File Reference Number

Information to be placed on Schedule A

- ☐ → OR Book & Page – except for short form
- ☐ → Insurance amount matches amount shown on worksheet
- ☐ → Effective date
- ☐ → Legal description of property (if not provided on Schedule A)

Reissue Rates/Substitution Loans

- ☐ → Copy of prior policy
- ☐ → Prior policy – underwriter name
- ☐ → Prior policy – underwriter name/policy number/effective date
- ☐ → Prior policy - insurance amount being used

Remember:

- Submit payment with policies
- Always send worksheet with a simultaneous policy
- Verify that check amount submitted equals the amount on the worksheet
- Use Black Ink Only
- Use White Paper Only
- Send copies only – not original policy
- Do not send documents from your closing file
- Do not submit duplicate policies if you are submitting policies electronically via DoubleTime