



Risk Assessment Checklist

Company Name: _____

Main Contact: _____

Provide Key Contacts:

Chief Financial Officer _____

Chief Operating Officer _____

President _____

Vice President _____

Human Resource
Manager _____

Safety Manager _____

Claims Coordinator _____

Other _____

Risk Assessment Required Information Checklist:

- Current copies of policies for all lines of coverage including policy forms
- Most current auto and equipment schedules
- Three - Five years of currently valued loss runs for all lines of coverage
- Written Safety Program
- Employee Handbook

Risk Assessment Additional Information Checklist helpful for assessment process:

- Experience Modification Worksheet for the past 3 years.
- Written Drug and Alcohol Testing Program
- OSHA Logs for past three years
- Copies of contracts you have between your top 5 customers/vendors
- Lease Agreements for buildings
- Organization Chart
- Business Income Worksheet
- Driver's List (including Drivers License # and Date of Birth)



Risk Assessment Checklist

- Annual Report
- Most current copy of General Liability and Workers Compensation audits.
- Stewardship Report