

Grinspec Insurance Agency, Inc.
Property & Casualty Insurance Program

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To best serve you, we will need to review your current insurance policies. We would also like to retain copies of the Declaration Page of each insurance policy as follows:

- Property, Inland Marine & Ocean Marine
- General Liability
- Boiler & Machinery
- Crime Bonds
- Fiduciary Coverage
- Business Auto
- Garage Policy
- Workers Compensation
- Umbrella Policy
- Employment Related Practices Liability
- Pollution
- Directors & Officers Liability

Other documents & information we would like to review:

- Appraisals (summary pages only) or Statement of Values listing the Age, construction (frame, block with wood roof etc...), square footage, alarms, existence of sprinklers for each building.
- Five year loss runs (we can supply you with a form letter to request loss runs)
- List of vehicles and drivers (including driver's license number and state of issue)
- Workers Compensation Payroll by classification
- Annual Revenues

Grinspec Insurance Agency, Inc.
Employee Benefits Program

To best serve you, we will need to review your current benefits booklets. Please forward a copy of the following booklets:

- Medical
- Prescription (if separate from medical)
- Dental
- Vision
- Long and Short Term Disability

We will also need an employee census including the following information for each employee:

- Date of Birth, Gender, Coverage Option (Traditional, HMO, POS, PPO), Dependent Status (Married, Single, Parent Child or Husband & Wife) and Salary.

Kindly answer the following questions:

- Is there an employee contribution for benefits? If yes, how much for each type of benefit?
- Do you have a Premium Only Plan (POP), whereby employee contributions are done on a pre-tax basis?
- Do you have a Flexible Spending Account (FSA)?
- Are you interested in discounted automobile and homeowners insurance for employees?