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TRUSTEES ERRORS & OMISSIONS INSURANCE DOCUMENT CHECKLIST

Copies of the following items must accompany each completed application. Please check mark each box after you have gathered the material.

Check List:

Application (must be original - signed and dated)

Trust Agreement and by-laws (signed and dated)

Trust Marketing and Underwriting Guidelines

Member Participation Agreement

Current Annual Audited Financial Statement or Feasibility Study for New Pools

Actuarial Report

Excess/Reinsurance Policy (full policy)

Contract with Underwriting Administrator

Contract with Claims Administrator

Other Service Contracts

In-House Administration - Resumes/and written Procedures Manuals, Hardware/Software for Computer Systems.

Where the Sponsoring Association is also applying for coverage:

Application (must be original - signed and dated)

Constitution (signed and dated) / The Association's by-laws

The Association's Current Annual Audited Financial Statement

Magazine / Periodicals