

Project / Client: _____ **Date:** _____

Use this checklist as a practical screening aid before relying on a contract and insurance package.

- ☐ **Executed Agreement**
Confirm the correct parties signed the complete agreement.

- ☐ **Project / Scope**
Confirm the project address, scope of work, and contracting parties match the actual job.

- ☐ **Contract Dates**
Confirm effective date, work period, and completion / termination dates.

- ☐ **Insurance Requirements**
Identify required policy types, limits, endorsements, and special conditions.

- ☐ **Certificate of Insurance**
Confirm a current COI was received from the correct insured.

- ☐ **Policy Dates Match**
Confirm policy effective / expiration dates cover the required contract and work period.

- ☐ **Liability Limits Match**
Compare CGL, Auto, Umbrella / Excess, and other required limits to the contract.

- ☐ **Additional Insured**
If required, confirm the correct entity and obtain the applicable endorsement.

- ☐ **Primary & Noncontributory**
If required, confirm supporting policy or endorsement wording.

- ☐ **Waiver of Subrogation**
If required, confirm the applicable waiver endorsement.

- ☐ **Completed Operations**
If required, confirm completed-operations protection and required duration.

- ☐ **Workers' Compensation**
Confirm statutory Workers' Compensation / Employer's Liability evidence where required.

- ☐ **Policy / Endorsement Review**
Request declarations and applicable endorsements if a deeper review is needed.

- ☐ **Open Issues Resolved**
Document outstanding discrepancies and confirm corrections before relying on the transfer path.

Notes / Items to Follow Up:
