



Insurance Renewal Review Checklist

 Show only Checklist

Display Style
Default 

Policy Details & Coverage Review

Verify policy information, coverage limits, and endorsements for accuracy and relevance.

Policy Number

Write something...

Insured Name

Write something...

Policy Effective Date

Enter date...



Policy Expiration Date

Enter date...

Coverage Limit - Property

Enter a number...

Coverage Limit - Liability

Enter a number...

Deductible Type

- ☐ Occurrence
- ☐ Loss Per Occurrence
- ☐ Annual Aggregate

Deductible Amount

Enter a number...

Endorsements/Riders Summary

Write something...

Risk Assessment Updates

Confirm any changes in risk factors, business operations, or assets that require coverage adjustments.

Describe any changes in business operations or activities.

Write something...

Estimated increase/decrease in payroll (if applicable).

Enter a number...

Change in number of employees (if applicable).

Enter a number...

New equipment or assets acquired (list details).

Write something...

Changes in security measures (e.g., cameras, alarms).

- ☐ Increased security personnel
- ☐ Installed/Upgraded Security Cameras
- ☐ Implemented/Upgraded Alarm System
- ☐ No Changes

Date of significant operational change.

Enter date...

Coverage Adequacy Analysis

Assess if existing coverage adequately addresses current and projected risks.

Current Insured Value of Assets

Enter a number...

Projected Growth in Assets (Next Year)

Enter a number...

Changes in Business Operations?

- ☐ No Change
- ☐ Minor Change
- ☐ Significant Change

Description of Changes in Business Operations (If Applicable)

Write something...

Change in Number of Employees

Enter a number...

New Exposures?

- ☐ No
- ☐ Yes

Description of New Exposures (If Applicable)

Write something...

Market Comparison & Quotation Gathering

Obtain quotes from multiple insurers to ensure competitive pricing and optimal terms.

Quote Request Date

Enter a number...

Carrier 1

- ☐ Carrier A
- ☐ Carrier B
- ☐ Carrier C
- ☐ Other

Carrier 1 Premium Quote

Enter a number...

Carrier 1 Quote Notes

Write something...

Carrier 2

- ☐ Carrier A
- ☐ Carrier B
- ☐ Carrier C
- ☐ Other

Carrier 2 Premium Quote

Enter a number...

Carrier 2 Quote Notes

Write something...

Policy Terms & Conditions Evaluation

Review policy terms, conditions, exclusions, and deductibles for potential impact.

Review Policy Exclusions

Write something...

Terms & Conditions Updates Required?

☐ Yes

☐ No

Summarize Key Changes in Terms & Conditions (if applicable)

Write something...

Deductible Amount - Confirm Accuracy

Enter a number...

Policy Cancellation Clause Review

- ☐ Reviewed and Acceptable
- ☐ Requires Clarification
- ☐ Unacceptable

Notes on Policy Forms/Clauses

Write something...

Regulatory Compliance Check

Ensure compliance with relevant insurance regulations and legal requirements.

State Licensing Verification Completed?

- ☐ Yes
- ☐ No

Last Compliance Training Date

Enter date...

Privacy Policy Updates Reviewed?

- ☐ Yes
- ☐ No

Summary of Relevant Regulatory Changes

Write something...

Compliance with Anti-Money Laundering (AML) Regulations?

- ☐ Yes
- ☐ No

Policy Number for Regulatory Reporting

Enter a number...

Documentation & Approval

Gather all necessary documentation and obtain approvals for the renewal process.

Renewal Date

Enter date...

Summary of Renewal Discussions

Write something...

Renewal Status

- ☐ Approved
- ☐ Pending Approval
- ☐ Rejected

Renewal Premium

Enter a number...

Supporting Documents

 Upload File

Approver Signature

Approval Date

Enter date...

Client Communication

Communicate renewal details, options, and recommendations to the client.

Renewal Summary Explanation

Write something...

Renewal Premium (USD)

Enter a number...

Client Communication Method

☐ Email

☐ Phone Call

☐ In-Person Meeting

Communication Date

Enter date...

Client Representative Name

Write something...

Client Signature (Confirmation)