

[Date]

[Insured Name]
[Business Name]
[Address Line 1]
[Address Line 2]

Re: Initial Documentation Request - Business Interruption Claim

Claim Number: [Claim Number]

Date of Loss: [Date of Loss]

Dear [Insured Name],

To begin the evaluation of your business interruption claim, we require specific financial documentation to establish your business's historical performance and the impact of the recent loss. Please provide the following items:

- Federal Income Tax Returns for the past two fiscal years (including all schedules).
- Monthly Profit and Loss (P&L) statements for the 24 months preceding the date of loss.
- Monthly Profit and Loss statements for the period from the date of loss to the present.
- Detailed general ledgers for the current year to date.
- Point of Sale (POS) reports or daily sales records for the 12 months preceding the loss.
- Business licenses and any contracts or leases impacted by the disruption.
- Payroll records for all employees for the 90 days prior to the loss and throughout the period of interruption.
- Documentation of any extra expenses incurred to reduce the loss or maintain operations.

Please submit these documents by [Due Date] to ensure a timely review of your file. Once we have analyzed this information, we may request additional documentation specific to your operations.

Documents can be submitted via [Email Address/Portal Link] or mailed to the address listed below.

Sincerely,

[Name of Adjuster/Representative]
[Title]
[Company Name]
[Phone Number]
[Email Address]