

[Date]

[Applicant Name]

[Company Name]

[Address]

[City, State, Zip Code]

Subject: Instructions for Securing Commercial Insurance Coverage

Dear [Applicant Name],

To proceed with your application for commercial insurance, please follow the instructions outlined below to ensure all necessary documentation is submitted for underwriting review.

Step 1: Complete Application Forms

Please complete, sign, and date the attached ACORD applications and the supplemental questionnaire specific to your industry.

Step 2: Provide Loss History

Submit "Currently Valued" loss runs from your previous carriers for the last [Number] years. If this is a new business venture, please provide a signed "No Loss Letter" on company letterhead.

Step 3: Financial Documentation

Provide a copy of your most recent audited financial statement or a summary of projected annual gross revenue for the upcoming policy term.

Step 4: Operational Details

Include copies of standard client contracts, safety manuals, or employee handbooks as requested in the attached checklist.

Step 5: Submission

Please return all documents via email to [Email Address] or upload them to our secure portal at [URL] by [Deadline Date].

Once these items are received, our underwriting team will review the file and provide a formal quotation within [Number] business days.

Sincerely,

[Your Name]

[Your Title]

[Your Agency/Company Name]

[Phone Number]