



I.S.E. INSURANCE SERVICES
WE PROTECT WHAT'S IMPORTANT TO YOU



COMMERCIAL INSURANCE - INFORMATION TO START QUOTE

1. GENERAL BUSINESS INFORMATION

Today's Date	Desired Effective Date				
Legal Business Name	DBA				
Mailing Address	Physical Address				
City / State / ZIP	Website				
Primary Contact	Phone				
Email	FEIN				
Years in Business	Years of Related Experience				
Business Entity	Corporation	LLC	Sole Proprietor	Partnership	Other

2. OWNERS / DRIVERS - LIST ALL OWNERS AND EMPLOYEES

Name	Driver License #	State	DOB	CDL	FT/PT	Viol./Accidents - 3 Yrs

3. DESCRIPTION OF OPERATIONS & EXPERIENCE

Primary reason for looking for new coverage?

Describe exactly what the business does, who you work for, where work is performed, and the types of customers served.

Describe owner's / technicians' experience, training, certifications, and prior related work:

4. LOCATION / SECURITY / OPERATIONS

Primary Physical Location	Own	Lease
Animals maintained on premises?	Yes	No
Firearms kept on person or premises?	Yes	No
Keys left in/on unattended customer vehicles?	Yes	No
Keys kept secure from unauthorized persons?	Yes	No
Serviced/charged fire extinguishers at shop or with mobile operation?	Yes	No
Customer autos stored after normal business hours?	Yes	No
Any work performed off premises / roadside / customer's location?	Yes	No
Vehicles stored/displayed at other locations?	Yes	No
Vehicles parked on street?	Yes	No
Location shared with another business?	Yes	No
If off-premises/mobile, percentage of total operations:	%	
If location is shared, describe separation / other business:		

5. EMPLOYEE / STAFF COUNTS & ANNUAL RECEIPTS

Total Owners	Mechanics / Technicians
Clerical	Sales / Service Managers
Other Employees / Helpers	1099 / Contract Workers
Projected Gross Sales - next 12 months	Annual Payroll
Repair incl. parts	Parts not installed
Vehicle sales	Tire sales
Welding/Fabrication	Other

6. GENERAL OPERATIONS

Loaner autos provided?	Yes	No	Ownership interest in another business?	Yes	No
Pick up / deliver customer vehicles?	Yes	No	Operations conducted from residence?	Yes	No
If subcontractors: work subcontracted / COIs obtained:					
If customer vehicles picked up/delivered: max radius			miles times/week		
Additional Insured required?	Yes	No	If yes, list name(s) / entity requiring AI status:		
1.					
2.					

SERVICE / REPAIR OPERATIONS

Enter approximate percentages. Vehicle-type total = 100%; service/repair total = 100%.

7. TYPES OF AUTOS / VEHICLES REPAIRED - TOTAL = 100%

Passenger / SUVs / Pick-ups / Vans	%	Salvage-Titled Autos	%
Antique / Classic / Vintage	%	Boats / Jet-Skis / Watercraft	%
Buses	%	Boom/Bucket/Cranes/Scissor Lifts	%
Electric Vehicles	%	Emergency Vehicles	%
Farm/Contractor/Construction Equipment	%	Forklifts	%
Golf Carts	%	Heavy Trucks over 26,000 GVW	%
Logging Trucks / Equipment	%	Mobility Vans	%
Motorcycles	%	Off-Road ATVs / UTVs	%
RV / Motorhomes / Campers	%	Semi-Trailers	%
Utility/Livestock Trailers	%	Other	%

8. SERVICE / REPAIR WORK PERFORMED - TOTAL = 100%

Airbag Service / Installation	%	Alarm / Stereo / Navigation	%
Auto Maintenance & Repair	%	Auto Wrapping	%
Bedliner Installation	%	Body Shop	%
Brakes	%	Detailing	%
Driver Assist Technology	%	EV Battery Repair	%
Electrical / Wiring	%	Fabrication / Manufacturing	%
Fiberglass	%	Frame Repair / Straightening	%
High Performance Enhancements	%	Hydraulic Systems	%
Lift Kits	%	Oil / Lube Service	%
Painting	%	Rim Sales / Repair	%
Roadside Assistance	%	Tire Sales / Repair	%
Towing / Wrecker	%	Trailer Hitch Install/Repair	%
Transmission	%	Upholstery	%
Van Conversion	%	Welding	%
Windshield / Glass / Tint	%	Other	%

Specialty vehicle/equipment percentages should total 100%.

9. SPECIALTY TYPES OF VEHICLES / EQUIPMENT - TOTAL = 100%

Boom/Cherry Picker <=100 ft / 24 ton	%	Boom/Cherry Picker >100 ft / 24 ton	%
Bucket/Man/Scissor Lift <=50 ft	%	Bucket/Man/Scissor Lift >50 ft	%
Concrete Trucks	%	Construction / Contractors Equipment	%
Cranes	%	Dump Trucks	%
Farm Implements / Equipment	%	Farm Vehicles / Tractors	%
Forestry / Logging Trucks/Equip/Trailers	%	Forklifts	%
Garbage Trucks	%	Lawn / Tree Service Equipment	%
Livestock Trailers	%	Military Vehicles	%
Mining Equipment	%	Municipal Vehicles	%
Oil Field Equipment	%	Semi-Trailers	%
Shredders / Splitters / Woodchippers	%	Tankers / Tank Trailers	%
Medium Trucks 10,001-26K GVW	%	Heavy Trucks 26,001-45K GVW	%
Extra Heavy Trucks >45K GVW	%	Utility / Horse / Service Trailers	%
Other	%		

Other / military / municipal / mining / oilfield / tanker details:

Do you drive heavy vehicles over 26K GVW on public roadways?

☐ Yes☐ No

If yes, CDL driver?

☐ Yes☐ No

10. EMERGENCY VEHICLES / BUSES - IF APPLICABLE

Ambulances	%	Fire Trucks	%	EMS Vehicles	%	Police Cars	%
Amphibious/Duck	%	Charter/Tour	%	Childcare/Church	%		
Public Transit	%	School	%	Shuttle	%		

Please detail the specific work you do on emergency vehicles / buses:

11. SPECIALTY REPAIR / SERVICE WORK - TOTAL = 100%

Alignment	%	Blades/Cutting Equip/Chippers	%
Body/Collision	%	Brakes	%
Brakes - Buses	%	Brakes - Logging Trucks/Equipment	%
DOT Inspections	%	Electrical/Wiring	%
Engine Overhaul	%	Fabrication/Manufacturing	%
5th Wheel Install/Repair	%	FMCSA Inspections	%
Frame Repair/Straightening	%	Frame/Structural Modification	%
Gasoline Tank Repair/Replace	%	Hand Control Install/Repair	%
Heating/Cooling	%	Hydraulics - General	%
Hydraulics - Lifting Apparatus	%	Lift Gate Installation	%
Painting	%	Power Train	%
Radiator	%	Refrigeration Unit Systems	%
Snowplow Repair/Install	%	Steering	%
Suspension	%	Suspension - Buses	%
Suspension - Logging Equip	%	Tank Cleaning - External	%
Tank Cleaning - Internal	%	Tank Repair - External	%
Tank Repair - Internal	%	Tires	%
Tires - Buses	%	Tires - Logging Equip	%
Trailer Hitch Installation	%	Transmission	%
Tune Ups	%	Welding	%
Other	%		

12. WHERE OPERATIONS ARE PERFORMED - TOTAL = 100%

Your Shop	%	Truck & Travel Center	%	Roadside	%	Customer's Location / Yard	%
Mechanics ASE Certified?	Yes	No	If no, minimum related experience required		years		
Welding - items/parts welded:							
Inside	Outside	Roadside	Customer Premises				
Area free of flammables	Extinguisher within 20 ft	30-min fire watch	Welding blanket	Tanks secured			
Fabrication - items/parts fabricated:							

13. SPECIALTY RISK QUESTIONS

Straighten frames?	Yes	No
Use computerized frame machinery/measurement?	Yes	No
Examine frame for structural damage before straightening?	Yes	No
Cut or stretch frames?	Yes	No
Alter safety equipment?	Yes	No
Common ownership in trucking/towing/livery business?	Yes	No
Piggyback owned/non-owned trucks/tractors?	Yes	No
Perform FMCSA annual vehicle safety inspections?	Yes	No
Install/service medical equipment on emergency vehicles?	Yes	No
Mechanics EVT certified?	Yes	No

Qualifications / training / experience / specialized work:

14. CUSTOMER VEHICLES / GARAGEKEEPERS

Average # customer vehicles in care	Maximum # customer vehicles in care				
Average value per vehicle	Maximum value any one vehicle				
Maximum total value at one time					
Garagekeepers coverage desired:	Legal Liability	Direct Primary	Comprehensive & Collision	Specified Causes & Collision	On / On-Hook

15. TOOLS / EQUIPMENT / SERVICE VEHICLE INVENTORY

Maximum total value of tools, equipment, parts and inventory carried on ANY ONE service vehicle:

Total value of tools/equipment kept at shop/location:	Any mobile diagnostic/computer equipment?	Yes	No
Describe high-value tools/equipment or special mobile equipment:			

16. OWNED / SCHEDULED AUTO UNIT SCHEDULE

#	Year	Make/Model	VIN	Radius	GVW	ACV	Primary Driver	Bus %	Pers %
1									
2									
3									
4									
5									
6									
7									
8									
9									
10									

17. PHYSICAL DAMAGE / ADDITIONAL INTEREST

Comprehensive & Collision

Specified Perils & Collision

Deductible

Additional Interest - Unit # / Name & Address / Interest (Loss Payee or Lessor):

Loss Payee

Lessor

Loss Payee

Lessor

Loss Payee

Lessor

18. AUTO UNDERWRITING QUESTIONS

All units registered/titled in business name?

Yes

No

All drivers disclosed?

Yes

No

Any units operated using dealer plates?

Yes

No

Any units used to tow/transport/recover autos?

Yes

No

Any units used on a for-hire basis?

Yes

No

Any units operated as a shuttle?

Yes

No

Any units operated as a ride-share service?

Yes

No

Where are units parked/stored when not in use?

Protective measures to prevent theft:

19. COVERAGES TO QUOTE

Garage / General Liability	Garagekeepers
Commercial Auto	Hired & Non-Owned Auto
Tools / Inland Marine	Commercial Property
Workers Compensation	Umbrella / Excess
Cyber Liability	EPLI
Dealer Physical Damage	Other

Coverage limits / deductibles / contract requirements / additional insured requirements:

20. CURRENT / PRIOR INSURANCE

Current Carrier	Policy #
Expiration	Premium

Prior carrier / coverage details:

21. LOSS HISTORY

Date	Amount Paid/Reserved	Description / Driver if applicable	Open/Closed
No prior losses	Loss runs attached		

22. ADDITIONAL NOTES

23. PROPERTY LOCATIONS / LIMITS / VALUATION

Location 1 Address

Location 2 Address

Location 3 Address

Bankruptcy - Chapter 7, 11 or 13 ever filed? Yes No If yes, explain

LOCATION 1 - COVERAGE / VALUATION

Coverage	Limit	Cause of Loss	Coins.	Valuation
Building				
Business Income				
Business Personal Property				
Equipment Breakdown				
Signs				
Fences				
Tenant Improvements				
Property Deductible				

LOCATION 2 - COVERAGE / VALUATION

Coverage	Limit	Cause of Loss	Coins.	Valuation
Building				
Business Income				
Business Personal Property				
Equipment Breakdown				
Signs				
Fences				
Tenant Improvements				
Property Deductible				

LOCATION 3 - COVERAGE / VALUATION

Coverage	Limit	Cause of Loss	Coins.	Valuation
Building				
Business Income				
Business Personal Property				
Equipment Breakdown				
Signs				
Fences				
Tenant Improvements				
Property Deductible				

24. CONSTRUCTION / BUILDING UPDATES / PROTECTION

	Location 1	Location 2	Location 3
Year Built			
Electrical Update			
Plumbing Update			
Heating Update			
Roof Update			
Square Footage			
Protection Class			

25. PROPERTY PROTECTION / HAZARD QUESTIONS - YES / NO BY LOCATION

Question	Loc 1		Loc 2		Loc 3	
Local Alarm	Y	N	Y	N	Y	N
Smoke Detectors	Y	N	Y	N	Y	N
Central Station Fire & Burglar Alarm	Y	N	Y	N	Y	N
Central Station Burglar Alarm	Y	N	Y	N	Y	N
Fire Extinguishers	Y	N	Y	N	Y	N
Extinguishers inspected/tagged within last year	Y	N	Y	N	Y	N
Sprinkler System maintained/tested annually	Y	N	Y	N	Y	N
Building vacant or unoccupied	Y	N	Y	N	Y	N
Aluminum wiring	Y	N	Y	N	Y	N
Federal Pacific Stab-Lock panels	Y	N	Y	N	Y	N
Fuses	Y	N	Y	N	Y	N
Knob & tube wiring	Y	N	Y	N	Y	N
Pigtailed wiring	Y	N	Y	N	Y	N
Wood/pellet stove	Y	N	Y	N	Y	N
Mobile home/mobile office	Y	N	Y	N	Y	N

Question	Loc 1		Loc 2		Loc 3	
Flammables in approved UL cabinets	Y	N	Y	N	Y	N
Waste/rags in self-closing non-combustible containers	Y	N	Y	N	Y	N
Paint booth/paint room	Y	N	Y	N	Y	N
Paint areas NFPA/UL compliant	Y	N	Y	N	Y	N
Welding inside building	Y	N	Y	N	Y	N
Welding safety procedures followed	Y	N	Y	N	Y	N
Welding area free of flammables	Y	N	Y	N	Y	N
Fire extinguisher within 20 ft of welding area	Y	N	Y	N	Y	N

26. PROPERTY LOSS HISTORY

Hard copy property loss runs attached

27. FINAL PROPERTY / UNDERWRITING NOTES