

Preparing your client for an Inspection Report can be an extremely important part of the underwriting process. Inspection Reports are used in order to determine whether your client qualifies for the insurance they have applied for. The client will be contacted to conduct a telephone interview. An interview should last approximately 15 minutes, however it may take more or less time depending upon the individual's circumstances. For their protection, the conversation will be recorded.

### VOICE TO YOUR CLIENT:

## The Purpose Of This Private Telephone Interview Is To Verify Specific Personal Information Provided On Your Application. You Should Be Prepared To Provide The Following:

- Personal identification, such as driver's license, or other valid documents, as applicable.
- Financial information to confirm personal and/or business income, assets, net worth, etc. Information should include name and phone number of your attorney and/or accountant who can verify financial information you provided on your application. Please ensure you have authorized your accountant to speak with us.
- All insurance coverage(s), to include existing policies and policies being applied for or being replaced. Will need specifics in regard to company name, amounts and purpose.
- Employment description, hobbies and other activities, such as aviation.
- Foreign travel, to include details/dates of anticipated international travel.
- Medical history, to include name, address, phone number of all doctors consulted within the past five years, dates, purpose, outcome of consultations, and current medications used, including dosages, frequency and over-the-counter.