Renewal Task Checklist

60+ DAYS PRIOR TO RENEWAL
NO LESS THAN 15 DAYS PRIOR
POST-RENEWAL OBLIGATIONS

Name of Insured:

Date Of Renewal:

- [ ] Review request details and assign appropriate team member to own the request
- [ ] Verify contact data is complete and accurate in Nexsure
- [ ] If additional info is needed from Client, gather it with urgency
- [ ] If direct access carrier, process S.R. as requested where possible
- [ ] If brokerage access carrier, send request and documentation to service contact
- [ ] If remarketing, prepare PDF recommendation and send to Client
- [ ] Update contact and opportunity in Nexsure; create notes as needed to document
- [ ] Confirm coverage details for all policies with Client
- [ ] Confirm Mortgagee, Lienholder and Additional Insured parties and info (IF ANY)
- [ ] Confirm billing preferences and update billing information as needed
- [ ] Set expectations for electronic signature and document delivery
- [ ] Upload binding documents and invoice (IF ANY) to contact in Nexsure
- [ ] Send EOI/COI to all relevant parties (Insured, Mortgagee, Additional Insured, etc.)
- [ ] Confirm Nexsure client portal access and troubleshoot any issues with Client as needed
- [ ] Process and record any applicable payment received (IF ANY)
- [ ] Delivery any promised value-add items or third party logins to insured
- [ ] Conduct a Final Review to ensure all documents and account details are buttoned up
- [ ] Set expectation for 30 day happiness check and mid-year review