



# COMMERCIAL PROPOSAL APPLICATION

DO YOU HAVE MULTIPLE ENTITIES?  YES  NO  
DO YOU HAVE MULTIPLE LOCATIONS?  YES  NO  
IF YOU HAVE MULTIPLE ENTITIES OR LOCATIONS, PLEASE COPY THIS FORM AND COMPLETE  
THOSE SECTIONS FOR EACH ADDITIONAL ENTITY OR LOCATION.

## GENERAL INFORMATION

### CONTACT INFORMATION

NAME \_\_\_\_\_ | DATE OF BIRTH \_\_\_\_\_  
( ) ( )

PHONE \_\_\_\_\_ FAX \_\_\_\_\_

EMAIL \_\_\_\_\_

MAILING ADDRESS (STREET) \_\_\_\_\_

CITY, STATE, ZIP \_\_\_\_\_

### BUSINESS INFORMATION

ENTITY NAME \_\_\_\_\_

DBA \_\_\_\_\_

ENTITY TYPE:  
 SOLE PROPRIETOR  CORPORATION  LLC  PLLC  PARTNERSHIP

FEIN OR SSN \_\_\_\_\_ | REQUESTED EFFECTIVE DATE \_\_\_\_\_ | YEAR STARTED \_\_\_\_\_

ANY CLAIMS IN THE PAST 5 YEARS  YES  NO IF YES, PLEASE DESCRIBE ON A SEPARATE SHEET

DESCRIPTION OF BUSINESS OPERATIONS \_\_\_\_\_

OWNERS & % OF OWNERSHIP FOR ALL OWNERS \_\_\_\_\_

ANNUAL GROSS REVENUE\* \_\_\_\_\_

## LOCATION INFORMATION

BUILDING OWNER \_\_\_\_\_  OWNED  LEASED

PROPERTY PHYSICAL ADDRESS (STREET) \_\_\_\_\_

CITY, STATE, ZIP \_\_\_\_\_

LOSS PAYEE \_\_\_\_\_

MORTGAGEE \_\_\_\_\_

YEAR BUILT \_\_\_\_\_ | # OF STORIES \_\_\_\_\_ | SQ FT OF BLDG \_\_\_\_\_ | SQ FT YOU OCCUPY \_\_\_\_\_

ARE ANY PARTS OF THIS BUILDING RESIDENTIAL  YES  NO

BUILDING CONSTRUCTION TYPE:\*  FRAME  JOISTED MASONRY  NON-COMBUSTIBLE  MASONRY NON-COMBUSTIBLE  FIRE RESISTIVE  
ROOFING MATERIAL:  FLAT: TPO / 3 PLY // GRAVEL  METAL  COMPOSITION SHINGLE  WOOD SHINGLE  OTHER  
AGE OF ROOF \_\_\_\_\_

BUILDING IMPROVEMENTS:  
 WIRING YR \_\_\_\_\_  
 ROOF YR \_\_\_\_\_  
 PLUMBING YR \_\_\_\_\_  
 HEATING YR \_\_\_\_\_

PROPERTY DEDUCTIBLE  
 \$500  \$1,000  \$2,500  \$5,000  \$10,000 OR MORE \_\_\_\_\_

TOTAL NUMBER OF EMPLOYEES (ATTACH JOB TITLES ON SEPARATE SHEET) \_\_\_\_\_

ANNUAL GROSS ORDINARY PAYROLL\* \_\_\_\_\_

ANNUAL GROSS SALARY / PAYROLL 10% OR MORE OWNERS/OFFICERS PAYROLL \_\_\_\_\_

WHAT IS THE VALUE AND NAME OF THE RETIREMENT PLAN (ERISA) \_\_\_\_\_

DOES THE BUILDING HAVE A FIRE SPRINKLER SYSTEM  YES  NO

DO YOU HAVE A FIRE ALARM  YES  NO

IF YES, WHO MONITORS THE ALARM \_\_\_\_\_

DO YOU HAVE A BURGLAR ALARM  YES  NO

IF YES, WHO MONITORS THE ALARM \_\_\_\_\_

ESTIMATED TOTAL COST TO REPLACE BUSINESS PERSONAL PROPERTY:  
• FURNITURE, FIXTURES AND EQUIPMENT \_\_\_\_\_  
• COMPUTER / PHONE HARDWARE AND SOFTWARE (DIGITAL EQUIPMENT TIED TO A MAIN SERVER) \_\_\_\_\_  
• TENANTS IMPROVEMENTS & BETTERMENTS\* (INSURABLE INTERESTS) \_\_\_\_\_  
TOTAL \_\_\_\_\_

ESTIMATED RECONSTRUCTION COST OF THE BUILDING \_\_\_\_\_

ESTIMATED RECONSTRUCTION COST OF ADDITIONAL STRUCTURES SUCH AS SHEDS, GARAGES, FENCES AND OUTSIDE SIGNS \_\_\_\_\_

\* SEE DEFINITIONS ON BACK  
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## COMMERCIAL INSURANCE PROGRAMS CHECKLIST

DO YOU WANT INFORMATION ON THE FOLLOWING COMMERCIAL INSURANCE PROGRAMS:

- YES  NO GENERAL LIABILITY  
 YES  NO PROFESSIONAL LIABILITY / ERRORS & OMISSIONS  
 YES  NO WORKERS COMPENSATION  
 YES  NO **UMBRELLA**  
 YES  NO **CYBER/NETWORK/DATA BREACH LIABILITY**  
 YES  NO **EMPLOYMENT PRACTICES LIABILITY**  
 YES  NO EARTHQUAKE  
 YES  NO FLOOD  
 YES  NO HEALTH  
 YES  NO DISABILITY  
 YES  NO LIFE  
 YES  NO DENTAL  
 YES  NO BUSINESS AUTO  
 OTHER: \_\_\_\_\_

IF YES, YOU WILL NEED TO COMPLETE SUPPLEMENTAL FORMS FOR QUOTES

## BUSINESS AUTO SUPPLEMENT

(COMPLETE ONLY IF APPLYING FOR BUSINESS AUTO INSURANCE)

### AUTO LIST

1	YEAR	MAKE	MODEL	VIN	PURCHASE PRICE
1	YEAR	MAKE	MODEL	VIN	PURCHASE PRICE
1	YEAR	MAKE	MODEL	VIN	PURCHASE PRICE
1	YEAR	MAKE	MODEL	VIN	PURCHASE PRICE
1	YEAR	MAKE	MODEL	VIN	PURCHASE PRICE

### DRIVER LIST

1	NAME	DATE OF BIRTH	LICENSE # / STATE
1	NAME	DATE OF BIRTH	LICENSE # / STATE
1	NAME	DATE OF BIRTH	LICENSE # / STATE
1	NAME	DATE OF BIRTH	LICENSE # / STATE
1	NAME	DATE OF BIRTH	LICENSE # / STATE

\*\*ATTACH LIST IF MORE THAN 5 AUTOS OR DRIVERS

## AGREEMENT

I hereby declare that, to the best of my knowledge and belief, the above information is true, accurate and complete. I understand that by signing this information request 3000 Insurance Group is not obligated to sell and I am not obligated to purchase the insurance nor does completion of this form either bind coverage or guarantee a policy.

SIGNATURE

DATE

## DEFINITIONS

### CONSTRUCTION TYPE:

- > **FRAME:** EXTERIOR SUPPORTING WALLS OR STUDS ARE WOOD OR OTHER COMBUSTIBLE MATERIALS INCLUDING WHERE THESE MATERIALS ARE COMBINED WITH MATERIALS SUCH AS BRICK VENEER, STONE VENEER, OR STUCCO.
- > **JOISTED MASONRY:** EXTERIOR WALLS ARE CONSTRUCTED OF MASONRY MATERIALS SUCH AS BRICK, CONCRETE BLOCK, STONE. THE SUB-FLOORS AND ROOF ARE COMBUSTIBLE (WOOD).
- > **NON-COMBUSTIBLE:** EXTERIOR WALLS, FLOORS, & ROOF ARE CONSTRUCTED AND SUPPORTED BY METAL OR OTHER NON-COMBUSTIBLE MATERIALS.
- > **MASONRY NON-COMBUSTIBLE:** EXTERIOR WALLS ARE CONSTRUCTED OF MASONRY MATERIALS AND THE FLOOR AND ROOF ARE MADE OF OTHER NON-COMBUSTIBLE MATERIALS.
- > **FIRE RESISTIVE:** EXTERIOR WALLS, FLOORS, ROOF ARE CONSTRUCTED OF MASONRY OR FIRE RESISTIVE MATERIAL.

**UMBRELLA:** PROVIDES INSURANCE FOR DAMAGES/INJURIES THAT YOU WILL HAVE TO PAY IN THE EVENT OF A LAWSUIT, BEYOND WHAT IS PROVIDED UNDER YOUR PRIMARY COMMERCIAL GENERAL LIABILITY AND/OR BUSINESS AUTO INSURANCE AND/OTHER COMMERCIAL POLICIES.

**CYBER/NETWORK/DATA BREACH:** BUSINESS OWNERS ARE REQUIRED TO MAINTAIN REASONABLE SECURITY FOR THE DIGITAL AND PAPER RECORDS THEY POSSESS OF THEIR CUSTOMERS AND VENDORS. THE OKLAHOMA CRIME SECURITY ACT, HIPAA, AND THE HITECH LAWS PLACE THE RESPONSIBILITY ON THE BUSINESS FOR PROTECTION, NOTIFICATION AND MONITORING.

**EMPLOYMENT PRACTICES LIABILITY:** COVERAGE DESIGNED TO PROTECT THE EMPLOYER FOR ACTIONS BROUGHT FOR EMPLOYEE NEGLIGENCE SUCH AS HARASSMENT AND DISCRIMINATION. THIRD PARTY MAY BE PURCHASED AS WELL.

**ORDINARY PAYROLL:** THE PAYROLL OF EMPLOYEES WHO ARE NOT INDEPENDENT CONTRACTORS OR SHAREHOLDERS, MEMBERS, OFFICERS OR OWNERS OF MORE THAN 10% OF THE BUSINESS.

**GROSS REVENUE:** THE GROSS RECEIPTS FOR A GIVEN ANNUAL PERIOD.

**TENANTS IMPROVEMENTS OR BETTERMENTS:** ALSO KNOWN AS THE "BUILD OUT". THIS IS THE COST OF PERMANENT IMPROVEMENTS TO THE LEASED SPACE; FROM CARPET, WALLS, MECHANICAL TO THE CEILING. TYPICALLY THE TENANT WILL HAVE AN INSURABLE INTEREST IN THESE ITEMS EITHER CONTRACTUALLY AS A PART OF THE LEASE AGREEMENT OR FINANCIALLY, WHERE THE TENANT FINANCES THE BUILD OUT SEPARATELY FROM THE LANDLORD.

**INSURABLE INTEREST:** THE FINANCIAL RESPONSIBILITY FOR A PARTICULAR ITEM. THIS RESPONSIBILITY IS TYPICALLY FINANCIAL OR CONTRACTUAL. WE RECOMMEND READING ANY LEASE AGREEMENTS FOR ALL INSURABLE INTERESTS.



3000 INSURANCE GROUP

Website

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