

COI Compliance Review Form

Page 1

Use this form to compare a certificate and endorsements with a client, venue, landlord, or contractor requirement.

Project & parties

Business legal name

DBA / trade name

Client / certificate holder

Project / location

Work start date

Work end date

Requirement check

General liability limit

Aggregate requirement

Additional insured required

☐ Check when verified / completed

Ongoing operations verified

☐ Check when verified / completed

Completed operations verified

☐ Check when verified / completed

Primary and noncontributory verified

☐ Check when verified / completed

Waiver of subrogation verified

☐ Check when verified / completed

Umbrella / excess required

☐ Check when verified / completed

Evidence received

COI policy dates checked

☐ Check when verified / completed

Legal names match

☐ Check when verified / completed

Endorsement copies received

☐ Check when verified / completed

Policy expiration before project end

☐ Check when verified / completed

Open issue / rejection reason

Broker / agent confirmation