

Business Insurance Renewal Meeting Prep

A fillable pre-renewal worksheet for changes that can affect coverage, rating, underwriting, or contract compliance.

Policy & meeting

Policy renewal date

Broker / agent

Meeting date

Policies to review

What changed this year

New services or products

New locations / remote work states

Employees / contractors / payroll

Vehicles / driving use

Major equipment purchases

Cyber systems / sensitive data

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Contracts & claims

New client insurance requirements

Claims / incidents / complaints

Open COI or endorsement issues

Premium audit issues

Renewal decisions

Limits to reconsider

Deductible / retention changes

Endorsements to add or remove

Follow-up owner and deadline