













E&O Policy Readiness Checklist

Checklist Items:

-  **Review your business activities and services covered under the current policy.**
-  **Identify any changes in services, products, or contracts since your last policy review.**
-  **Gather documentation of all contracts, client communications, and service agreements.**

-  Check for any outstanding claims or pending disputes.
-  Make a list of all employees or contractors who need to be included in the coverage.
-  Ensure you understand your policy limits, exclusions, and deductibles.
-  Evaluate your client onboarding process for potential risk exposures.
-  Confirm that your professional licenses and certifications are up to date.
-  Consult with your insurance broker to discuss any changes or updates needed.
-  Keep a digital copy of the updated policy and ensure relevant team members can access it.

This checklist helps you stay proactive, prepared, and protected before locking in your E&O coverage.

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