MONTRIDGE INSURANCE SERVICES, INC.

High-Value Load Information Worksheet

Collect property and responsibility details for an insurance review of one load.

Property and owner

Describe the equipment, owner, identification and related components.

Values and evidence

Record invoice, replacement estimate, valuation date and source.

Dates and locations

Record origin, worksite, storage intervals and final destination.

Responsibility

Identify carrier, rigger, crane supplier, installer and who accepts each step.

Terms and evidence

Record any limits, deductibles, declared values and relevant form references.

Open questions

Assign questions for the broker, insurer, customer or counsel.

Keep this worksheet in your authorized records. Use appropriate channels for sensitive information.