MONTRIDGE INSURANCE SERVICES, INC.

Lift Contract and Insurance Review Checklist

Compare the signed scope, contract requests and current forms for one engagement.

Contract and entities

Record version, parties, jobsite, dates and work allocation.

Equipment, crew and custody

Identify the crane, operator, rigging supplier and change points.

Insurance and evidence

List requested forms, limits, additional insured status and endorsements.

Load and valuation

Record values, property and each handoff or storage period.

Indemnity and obligations

Flag terms that warrant review by counsel, broker or insurer.

Open items and authority

Record unresolved language, responsible person and clearance date.

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