

For wholesale distributors of HVAC equipment and refrigerants, plumbing and waterworks supplies, and electrical supplies, selling mainly to contractors. Building supply stores use CWCO-SUP-BLDSUPPLY and contractors use their own trade forms. Complete with ACORD 125, 126, 127, and 140. Attach a branch list, the vehicle and driver schedule, a list of private-label and directly imported products, and five years of loss runs.

1 APPLICANT / BUSINESS INFORMATION

LEGAL BUSINESS NAME	DBA	FEIN	YEARS IN BUSINESS
MAIN BRANCH ADDRESS	CITY / STATE / ZIP	WEBSITE	

Entity type:
☐ Sole proprietor ☐ Partnership ☐ LLC ☐ Corporation

PRIMARY CONTACT / TITLE	PHONE	EMAIL
NUMBER OF BRANCHES	BUYING GROUP MEMBERSHIP	STATES SERVED

2 OPERATIONS

DESCRIBE THE PRODUCT LINES, CUSTOMERS, AND BRANCH OPERATIONS

PRODUCT CATEGORY	% OF SALES

Categories: HVAC equipment; refrigerants; ductwork and sheet metal; pipe, valves, and fittings; water heaters and boilers; fixtures; waterworks; wire and cable; breakers, panels, and switchgear; lighting; solar and EV charging; tools.

Customers (check all that apply):

☐ Contractors
 ☐ Industrial / MRO accounts
 ☐ Utilities and municipalities
 ☐ Property managers
 ☐ Homeowners (walk-in)
 ☐ Online

Size:

Delivery vehicles
 Boom / crane trucks
 Drivers
 Employees
 Warehouse sq. ft.

Value-added services (check all that apply):

☐ Pipe cutting / threading
 ☐ Wire cutting / reeling
 ☐ Panel or kit assembly
 ☐ Equipment startup / commissioning
 ☐ Design / load calculations
☐ Rental tools

3 EXPOSURE & RISK QUESTIONS — PRODUCTS & SOURCING

A nationwide distributor sold more than 20,000 counterfeit circuit breakers, which can fail to trip, without any record of who bought them. Distributors also lose seller protections for private-label and directly imported goods.

3-1 Are all breakers, panels, and switchgear bought from manufacturers or their authorized channels? ☐ Yes ☐ No
 IF NO, EXPLAIN

3-2 Does the applicant sell surplus, reconditioned, or obsolete electrical equipment? ☐ Yes ☐ No
 IF YES, EXPLAIN

3-3 Are any products sold under the applicant's own brand or private label? ☐ Yes ☐ No
 IF YES, EXPLAIN

3-4	Does the applicant import any products directly from overseas factories?	☐ Yes ☐ No
IF YES, EXPLAIN		
3-5	Do suppliers name the applicant as additional insured with a vendor's endorsement?	☐ Yes ☐ No
IF NO, EXPLAIN		
3-6	Does the applicant sell refrigerants?	☐ Yes ☐ No
IF YES, EXPLAIN		
3-7	If yes to 3-6, is technician certification verified before every refrigerant sale?	☐ Yes ☐ No
IF NO, EXPLAIN		
3-8	Are all plumbing products for drinking water certified lead-free?	☐ Yes ☐ No
IF NO, EXPLAIN		
3-9	Does the applicant assemble panels, kits, or equipment packages for customers?	☐ Yes ☐ No
IF YES, EXPLAIN		
3-10	Does the applicant start up or commission equipment at customer sites?	☐ Yes ☐ No
IF YES, EXPLAIN		
3-11	Does the applicant provide system design or load calculations?	☐ Yes ☐ No
IF YES, EXPLAIN		

4 EXPOSURE & RISK QUESTIONS — FLEET, JOBSITE DELIVERY & BRANCHES

A plumbing and heating supply distributor was hit with a \$23.7 million verdict after its work truck struck a motorcyclist. Boom-truck drops at busy jobsites add crane and property damage exposure.

4-1	Are drivers' motor vehicle records checked at hire and each year?	☐ Yes ☐ No
IF NO, EXPLAIN		
4-2	Do delivery vehicles have telematics or driver-facing cameras?	☐ Yes ☐ No
IF NO, EXPLAIN		
4-3	Are boom and crane truck operators certified?	☐ Yes ☐ No
IF NO, EXPLAIN		
4-4	Do drivers place material on roofs or upper floors?	☐ Yes ☐ No
IF YES, EXPLAIN		
4-5	Are refrigerant cylinders and other hazmat shipped under DOT hazmat rules?	☐ Yes ☐ No
IF NO, EXPLAIN		
4-6	Are branches sprinklered?	☐ Yes ☐ No
IF NO, EXPLAIN		
4-7	Are flammable refrigerants and gases stored in a separate ventilated area?	☐ Yes ☐ No
IF NO, EXPLAIN		
4-8	Is copper and wire stock kept in a locked, alarmed area?	☐ Yes ☐ No
IF NO, EXPLAIN		
4-9	Do customers pick up material from the yard or warehouse themselves?	☐ Yes ☐ No
IF YES, EXPLAIN		
4-10	Are forklift operators trained and certified?	☐ Yes ☐ No
IF NO, EXPLAIN		

5 PAYROLL, SALES & REVENUE

ANNUAL GROSS SALES (\$)	PRIVATE-LABEL / IMPORTED SALES (\$)	TOTAL ANNUAL PAYROLL (\$)	DRIVER PAYROLL (\$)

6 PRIOR INSURANCE & LOSS HISTORY

Attach currently valued loss runs for the last 5 years.

GL / PRODUCTS CARRIER / LIMIT

AUTO CARRIER / LIMIT

UMBRELLA CARRIER / LIMIT

DATE OF LOSS	DESCRIPTION	TOTAL INCURRED (\$)	OPEN / CLOSED

6-1 Has a product sold by the applicant been blamed for a fire, flood, or injury in the past 5 years?

☐ Yes ☐ No

IF YES, EXPLAIN

6-2 Has a delivery vehicle been in a crash causing injury in the past 5 years?

☐ Yes ☐ No

IF YES, EXPLAIN

6-3 Has any coverage been declined, cancelled, or non-renewed?

☐ Yes ☐ No

IF YES, EXPLAIN

6-4 Is the applicant aware of any incident or circumstance that could give rise to a claim?

☐ Yes ☐ No

IF YES, EXPLAIN

7 RISK MANAGEMENT & SAFETY

7-1 Is there a written fleet safety program with accident review?

☐ Yes ☐ No

IF NO, EXPLAIN

7-2 Can every lot of electrical gear be traced to the customer who bought it?

☐ Yes ☐ No

IF NO, EXPLAIN

7-3 Are supplier certificates of insurance tracked and renewed each year?

☐ Yes ☐ No

IF NO, EXPLAIN

8 SIGNATURE & FRAUD WARNING

The undersigned declares that the statements and answers given in this supplemental are true, complete and correct to the best of their knowledge, and that no material fact has been withheld or misstated. The applicant agrees that this supplemental, together with all ACORD applications and attachments, forms the basis of any submission to insurers and may be relied upon by them. Signing this supplemental does not bind coverage. This supplemental is an intake document prepared by Cory Washington & Co. LLC to support carrier submission; it does not itself provide coverage.

FRAUD NOTICE: Any person who knowingly and with intent to defraud any insurance company or other person files an application for insurance containing any materially false information, or conceals for the purpose of misleading information concerning any fact material thereto, may be committing a fraudulent insurance act, which is a crime and may subject such person to criminal and civil penalties. State-specific fraud warnings appear on the insurer's application.

APPLICANT / AUTHORIZED SIGNATURE (TYPE FULL NAME)

TITLE

DATE

PRODUCER — CORY WASHINGTON & CO. LLC

PRODUCER SIGNATURE (TYPE FULL NAME)

DATE