

Covers dealers and distributors of industrial equipment and machinery — material handling, metalworking and fabrication, compressors and pumps, packaging and process equipment, and construction and aerial equipment — including field service, parts, used equipment, and rentals. Complete with ACORD 125/126/127/140. Attach the line card, a list of imported lines with country of origin, and the rental fleet schedule if any.

1 APPLICANT / BUSINESS INFORMATION

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

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

PRIMARY CONTACT / TITLE	PHONE	EMAIL

NUMBER OF BRANCH LOCATIONS	AUTHORIZED DEALER FOR (MAIN BRANDS)

2 OPERATIONS

DESCRIPTION OF THE BUSINESS (EQUIPMENT LINES, CUSTOMERS, TERRITORY, SERVICES)

REVENUE SOURCE	% OF REVENUE

Revenue sources: new equipment sales; used equipment sales; parts; field service & repair; installation & commissioning; rentals; training; engineering or custom design.

Equipment types (check all):

- ☐ Forklifts / material handling ☐ Aerial lifts / cranes ☐ Metalworking / CNC ☐ Compressors / pumps ☐ Packaging / process lines
☐ Construction equipment ☐ Conveyors / automation / robotics ☐ Boilers / pressure vessels

Size and volume:

- Field service techs Service trucks Rental units Used units sold per year Lowboys / haulers

3 EXPOSURE & RISK QUESTIONS — PRODUCTS, USED EQUIPMENT & MODIFICATIONS

In a forklift case, the selling dealers were sued with the manufacturer after a safety switch was bypassed; they won because the switch worked at delivery. A dealer that makes the modification loses that defense.

3-1 Does the applicant sell used or remanufactured equipment, and is each unit inspected and documented before sale? ☐ Yes ☐ No
 IF YES, EXPLAIN

3-2 Does the applicant modify, retrofit, or remove guards or safety devices at a customer's request? ☐ Yes ☐ No
 IF YES, EXPLAIN

3-3 Does the applicant design, engineer, or integrate custom systems (conveyors, cells, process lines)? ☐ Yes ☐ No
 IF YES, EXPLAIN

3-4 Are any lines imported directly or made by manufacturers without U.S. products liability insurance?	☐ Yes ☐ No
IF YES, EXPLAIN	
3-5 Do manufacturers name the applicant as additional insured and provide indemnity under dealer agreements?	☐ Yes ☐ No
IF YES, EXPLAIN	
3-6 Are operator manuals, warnings, and delivery inspection checklists signed by the customer at delivery?	☐ Yes ☐ No
IF YES, EXPLAIN	
3-7 Does the applicant act on manufacturer safety bulletins and recalls for units it has sold?	☐ Yes ☐ No
IF YES, EXPLAIN	
3-8 Are any used units sold "as is" without inspection, and does the contract disclaim warranties?	☐ Yes ☐ No
IF YES, EXPLAIN	

4 EXPOSURE & RISK QUESTIONS — SERVICE, RENTAL & TRAINING

Two rental companies each faced \$1 million claims after renting lifts without inspection; undocumented inspections left no defense.

4-1 Do technicians work at customer sites, and are lockout/tagout and fall protection used on every job?	☐ Yes ☐ No
IF YES, EXPLAIN	
4-2 Are service and repair records kept for every unit, including parts replaced and safety checks?	☐ Yes ☐ No
IF YES, EXPLAIN	
4-3 Does the applicant rent equipment, and are units inspected before each rental and at set hour intervals?	☐ Yes ☐ No
IF YES, EXPLAIN	
4-4 Do rental contracts require the customer to carry insurance and name the applicant as additional insured?	☐ Yes ☐ No
IF YES, EXPLAIN	
4-5 Does the applicant train or certify customers' operators (for example, forklift operators)?	☐ Yes ☐ No
IF YES, EXPLAIN	
4-6 Does the applicant haul equipment on its own trucks, lowboys, or trailers?	☐ Yes ☐ No
IF YES, EXPLAIN	
4-7 Does the applicant work on boilers, pressure vessels, or refrigeration systems?	☐ Yes ☐ No
IF YES, EXPLAIN	

5 PAYROLL, SALES & REVENUE

TOTAL ANNUAL PAYROLL (\$, ILLUSTRATIVE)	FIELD SERVICE PAYROLL (\$, ILLUSTRATIVE)	NUMBER OF EMPLOYEES
PROJECTED ANNUAL GROSS REVENUE (\$, ILLUSTRATIVE)	PRIOR YEAR REVENUE (\$, ILLUSTRATIVE)	RENTAL REVENUE (\$, ILLUSTRATIVE)

6 PRIOR INSURANCE & LOSS HISTORY

Attach currently-valued loss runs for the last 5 years.

CURRENT GL / PRODUCTS CARRIER

INLAND MARINE / EQUIPMENT CARRIER

UMBRELLA LIMIT

6-1 Has any carrier declined, cancelled, or non-renewed coverage for this business in the last 5 years?

☐ Yes ☐ No

IF YES, EXPLAIN

6-2 Has the applicant been named in a suit alleging equipment it sold, serviced, or rented caused injury?

☐ Yes ☐ No

IF YES, EXPLAIN

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

6-3 Is the applicant aware of any incident, complaint, or circumstance not yet resulting in a claim that could reasonably give rise to one?

☐ Yes ☐ No

IF YES, EXPLAIN

7 RISK MANAGEMENT & SAFETY

7-1 Is there a written policy that prohibits technicians from bypassing or removing safety devices?

☐ Yes ☐ No

IF YES, EXPLAIN

7-2 Are sales, service, and rental records kept for at least 10 years for each serial number?

☐ Yes ☐ No

IF YES, EXPLAIN

7-3 Are technicians certified by manufacturers and trained annually?

☐ Yes ☐ No

IF YES, 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, commits a fraudulent insurance act, which is a crime and subjects such person to criminal and civil penalties. (State-specific fraud warnings apply; see state amendatory notice.)

APPLICANT / AUTHORIZED SIGNATURE (TYPE FULL NAME)

TITLE

DATE

PRODUCER — CORY WASHINGTON & CO. LLC

PRODUCER SIGNATURE (TYPE FULL NAME)

DATE