

Checklist for Certificate of Insurance

Name of Contract: _____

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| Yes | No | Does the Certificate of Insurance reference the correct contract? |
| Yes | No | Is the Contractor the Named Insured or a subsidiary of? |
| Yes | No | Is the Insurance Company, for each policy, shown on the Certificate? |
| Yes | No | If yes, are the insurance companies licensed to conduct business in the Province? |
| Yes | No | Is there a policy number indicated for each policy on the Certificate? |
| Yes | No | Is each policy period shown on the Certificate? |
| Yes | No | Is each policy period current? |
| Yes | No | Does any insurance policy period expire before contract completion? |
| Yes | No | If yes, has a follow-up been initiated to request a renewal Certificate? |
| Yes | No | Is the Certificate of Insurance signed? |
| Yes | No | Is the entity shown as the Certificate Holder? |
| Yes | No | Is the entity added as an Additional Insured? |
| Yes | No | Does the contract require any other party to be added as an additional insured? |
| Yes | No | If yes, are they shown? |
| Yes | No | Is the limit of liability insurance as requested in the contract? |
| | | If no, what action will you take to rectify the shortfall? |
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| Yes | No | Is the policy written on an occurrence form? |
| Yes | No | Does the policy have a General Aggregate? |
| Yes | No | Is Non-owned Automobile shown on the Certificate? |
| Yes | No | Did the contract require proof of Automobile Insurance? |
| Yes | No | If yes, is Automobile Insurance shown in the Certificate? |
| Yes | No | Is the limit of liability as requested? |
| Yes | No | If Umbrella Coverage is shown, does it state that the "policy follows form"? |
| Yes | No | Are property coverages shown as requested? (Contractor's Equipment Floater, Builder's Risk, etc.) |
| Yes | No | Is the Notice of Cancellation as requested? |
| Yes | No | Are all other coverages shown as requested? (Environmental Insurance; Errors & Omissions; Crime) |
| Yes | No | Are these policies written on a claims made form? |
| Yes | No | Does the contract require an extending reporting period in the insurance policy? |
| Yes | No | Does any policy show a deductible? |
| Yes | No | If yes, is the deductible as per the contract? |
| Yes | No | Are there any exceptions noted in the comments section? |
| Yes | No | Due to the noted exceptions or omissions, should the Certificate be reviewed by legal? |

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