Enterprise contract insurance worksheet

Record the requirement, locate the evidence, and resolve open questions with your broker and counsel.

Company	Customer / contract reference	Review date

Copy exact wording and document references. Leave unknowns open; a blank field does not mean a requirement is met.

Review item	Exact contract wording	Policy / endorsement evidence	Question or next action
Coverage types Name the coverage and relevant work.			
Limits Per claim, aggregate, shared limits, sublimits.			
Insured entities Match the legal entities and covered operations.			
Additional insured Identify the entity, coverage line and wording.			
Special provisions Primary status, noncontributory wording, waivers.			

Educational planning aid. This worksheet does not establish contractual compliance or bind, alter or extend coverage.
Policy terms and endorsements control. Review jurisdiction-specific requirements with your broker and legal adviser.

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Review item	Exact contract wording	Policy / endorsement evidence	Question or next action
Evidence required Certificate, endorsement copies or other evidence.			
Dates and continuity Start date, policy period and ongoing obligations.			
Other obligations Notice terms and requirements in related documents.			

Resolution log

Record an agreed next step and its evidence. Ask the broker or counsel to resolve uncertainty before relying on it.

Open item / agreed action	Owner	Due date	Status / evidence

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