



Program Submission Information Requirements

1. Program Information

- a) Name and address of program manager
- b) History of program and/or group
 - i. Purpose of formation
 - ii. Description of operations
 - iii. Number of years in existence
 - iv. Number of insureds
 - v. Average amount/insured size
- c) Prior and current insurance structure – including lines of coverage, retention, limits, excess carriers, premiums, loss history, service companies
- d) Marketing Strategy
 - i. Target Accounts
 - ii. Projected Growth
 - iii. Competition

2. Program Information

- a) Desired coverage by line of business
- b) Rating information by line of business
- c) Policy Forms
 - i. Current policy forms
 - ii. Copies of all endorsements
 - iii. Pending changes (if applicable)
- d) Underwriting Administration
- e) Staff experience
- f) Underwriting guide and procedures
- g) Currently valued loss information for past 5 years
- h) Detailed description of all large losses excess of \$50,000
- i) Actuarial Report including triangulated data, IBNR and loss reserve analysis, ultimate loss projections by line of business, rate analysis and capital/funding requirements

3. Loss Control

- a) Programs and guidelines
- b) Safety manual
- c) Copy of a specific report or survey

4. Claims Administration and Management

- a) TPA or Staff experience (including resumes of claims personnel)
- b) Procedures, authority levels
- c) Large loss strategy