



Handyman Insurance Quote Worksheet

Insurance Associates Agency Inc. | West Chester, OH

Complete this form to receive your comprehensive SW Ohio quote and COI.

1. Business Essentials

- Legal Business Name: _____
- Years in Business: New Venture 1–5 Years 5+ Years
- Primary City of Operation: _____
- Federal EIN: _____

2. Coverage Limits & Bonding

- Requested Liability Limit:
 - \$1M / \$2M
 - \$2M / \$4M (Recommended for Commercial Contracts)
- Do you need an Umbrella/Excess policy? Yes No
- Do you need a License & Permit (L&P) Bond? Yes No
 - If yes, for which city/municipality? _____

3. The "Ohio Hole" Check (Employment Data)

- How many employees do you have? _____
- Do you use 1099 Subcontractors? Yes No
 - If yes, do you require them to carry their own insurance? Yes No
- Do you need Stop Gap & Dual Capacity protection? Yes No

4. Asset Protection

- Total Replacement Value of Tools/Equipment: \$ _____
- Number of Vehicles used for business: _____
- Do you haul trailers? Yes No

5. Contact Information for COI Delivery

- Name of Principal: _____
 - Direct Phone: _____
 - Email for COI: _____
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Why we ask these questions:

- **The EIN & City:** Allows us to verify your local licensing requirements.
 - **Employees/Subs:** Helps Terry McCarthy, CLU, ChFC calculate your **Stop Gap** risk.
 - **Tools Value:** Ensures your "mobile office" is fully covered against theft, a common issue in SW Ohio.
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How to Submit

Email this completed form to: tamccarthy@insursmart.com

Or Call: 513-779-7920 x135

Visit Us: 8114 Paul Manors Dr, Ste 200, West Chester, OH 45069

*"Did you know? 90% of online-only policies exclude 'Employer Intentional Torts.'
We include Stop Gap to protect your personal assets."*