

New Auto Client Checklist

By Taylor Peterson

- Mandatory Documents
 - New Client Folder with Bill of Rights, Expectations, ID Card Jacket with contacts sticker and Accident Report guide
 - Regional Signature Document
 - Copy of Drivers License
 - Rental Reimbursement Disclosure
 - Copy of Drivers License
 - Proof of Insurance
- If Applicable Docs
 - Academic Achievement Documentation
 - Defensive Driving Certificate
 - Voided Check & Pac Agreement
 - Steer Clear Doc
 - Academic Achievement Doc
 - Proof of Purchase
 - Selection Rejection Doc (PIP, Med)
- Appointment Completion Docs
 - Red Folder and follow up appt.
 - 2 addl products quoted (please write type)
- Conclusion
 - Send new client survey
 - Start New Client SMP with referral gift
 - Hit sale button in prospector
 - Thank you Letter
 - Scan Docs in app & Electronic File