

# 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