New Auto Client Checklist

Created: 1/1/2012

# Tasks:

☐ **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 Reimbursemnt Disclosure**

☐ **Copy of Drivers License**

☐ **Proof of Insurance**

☐ **If Applicable Docs**

☐ **Academic Achievment Documentation**

☐ **Defensive Driviing Certificate**

☐ **Voided Check & Pac Agreement**

☐ **Steer Clear Doc**

☐ **Academic Achievment 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**