



Request for Insurance Requirement Template

Please send a completed copy of this form along with any contract template(s) you have been using with each request for a new template. Thank you.

Requestor's Name:	Click or tap here to enter text.	Date:	Click or tap to enter a date.
Phone Number:	Click or tap here to enter text.	E-mail Address:	Click or tap here to enter text.

Client reference in contract. Ex. client = Company	Click or tap here to enter text.
Other party reference. Ex. other party = Contractor	Click or tap here to enter text.
Template Due Date:	Click or tap to enter a date.
Desired Length and Scope of Insurance Requirements:	☐ Basic = typically 1 to 4 pages, as short as possible, least protective, includes basic insurance coverages
	☐ Short = typically 3 to 9 pages, includes most commonly required insurance coverages, not as protective as Long version
	☐ Long = typically 6 to 15 pages, most protective, broad range of options that may be needed based on best-practices to lower client's contractual risk
Sample Certificate of Insurance?	☐ Yes or ☐ No
Typical Estimated Contract Value:	☐ under \$1M
	☐ \$1M to \$10M
	☐ over \$10M
Contract Type? Ex. Construction	Click or tap here to enter text.
Describe Typical Scope of Work:	Click or tap here to enter text.
Project Location / Address:	Click or tap here to enter text.
Estimated Project Term:	Click or tap here to enter text.
Estimated Project Start Date:	Click or tap here to enter text.
Estimated Project End Date:	Click or tap here to enter text.
Any prior uninsured claims or particular risk concerns?	Click or tap here to enter text.

Could the scope of work include potential use of, or exposure to, the following? Check if yes.			
Use of aircraft	☐	Heavy equipment	☐
Use of, selling, or serving alcohol	☐	3 rd party logistics (transporting or storing property of others)	☐
Armed guards or use of armored vehicles	☐	Providing computer hardware or software	☐
Security guard services	☐	Work on, over, in, or next to water	☐

For additional contract review resources and tools, please go to <https://www.contractriskacademy.com>.



Work with natural gas	☐	Professional services	☐
Design engineering or architectural services	☐	Plumbing services	☐
Work involving utilities / provision of service	☐	Any pollution or environmental exposure	☐
Blasting, caustics, flammables, or explosives	☐	Access to PII, PHI, clients' or customers' confidential data, intranet, or computer systems	☐
Work with or around children	☐	Transporting 3 rd Parties (other people)	☐
Collapse of structure	☐	Use of vehicles in scope of work	☐
Cranes or rigging services	☐	Work involving watercraft	☐
Crowd exposures	☐	High wildfire risk	☐
Cyber-related exposures	☐	Work at heights	☐
Use of drones	☐	Work involving vehicles	☐
Earthquakes	☐	Work within 50 feet of railroads	☐
Hurricanes / named windstorms	☐	Work near water, docks, or wharves	☐
Legal services	☐	Underground work or excavation	☐
Maintenance or inspection services	☐	Handling of funds or assets	☐
Construction management	☐	Work near roads	☐
Electrical work	☐	Work near airports	☐
Surveys, soil engineering, topographical surveys	☐	Zoning or planning services	☐
Work involving boilers, pressure vessels, or turbines	☐	Media services	☐
Pharmaceutical products	☐	Aircraft products	☐
Food products	☐	Children's products	☐
Medical products or devices	☐	Automotive products	☐