
BUSINESS OWNERS POLICY – MONTELEONE INSURANCE

In efforts to find you the best value and coverage From ALL our carriers, kindly fill out the following questions to the best of your ability.

If you do not know the answer, please leave blank or reach out to our team for guidance.

Thank you!

Questions or Requests: BRoeder@MonteleoneAssociates.com or 631-544-4000.

Current Policy Information

Upload Existing BOP Policy (This is efficient to compare current coverages, endorsements and pricing)



Click or drag a file to this area to upload.

Upload Existing UMBRELLA Policy (This is efficient to compare current coverages, endorsements and pricing)



Click or drag a file to this area to upload.

How Many Years Have You Been With The Same Carrier(s)?

Business Information

Legal Name Of The Entity:

Doing Business As (DBA Name If Applicable):

Tax ID Number/FEIN:

Please Describe Your Business (what do you do? wholesale? retail? manufacture?):

How Many Years Of Industry Experience? What Date/Year Was The Business Formally Started?

Main Contact Name:

Main Contact Email *

Office Phone Number

Mobile Phone Number:

Fax Number:

Business Address:

What Type Of Property (stand alone building, shopping center, office building)? Are You The Sole Occupant or Are Other Businesses At Same Location?

Square Footage Of Your Business Location? Is 100% Of The Business Location Open To The Public?

Last Year Of Each Separate Property Updates (Roof, Heat, Plumbing, Electric):

Do You Have Sprinklers In Your Business Location? If Yes, Full, Partial, or None?

- Yes
- No
- Yes In Some, But Not All

Burglar Alarm?

- Central Station
- Local
- None

Fire Alarm?

- Central Station
- Local

None

If More Than One Location, Please List: ->Location Description (Warehouse, Retail, Distribution Etc.) ->Building Description (Square Footage, and Build (Wood, Brick, Mix Etc.)) ->Last Year Of Separate Updates (Roof, Heat, Plumbing, Electric): ->Sprinklers (None, Full or Partial) ->Fire or Burglar Alarms (None, Local or Central Station)

What Are Your Estimated Annual Sales/Revenue?:

What Are Your Estimated Total Annual Payroll By Job Position? (Some Carriers Will Provide Rates Using Field Payroll).

What Is Your Estimated Business Personal Property Value (Inventory, Rented Equipment, Furniture, Computers, All Other Property In Store/Office, and Improvements Made):

Kindly Best Describe If Any Claims Were Made or Settled In The Past 5 Years:

Please Let Us Know Any Questions, Concerns or Important Information:

Submit