

Contractors Insurance Intake Worksheet

A structured worksheet to gather contractor business details, payroll estimates, class codes, and subcontractor information before requesting commercial insurance quotes.

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Business Information
Business name
DBA (if applicable)
Business address
Years in business
Contractor license number
Type of contractor work performed
Number of owners / partners

Operations Overview
Primary trade (ex: general contractor, electrician, plumbing)
Secondary trades or specialties
Typical project size
Residential, commercial, or mixed projects
Geographic service area
Percentage of subcontracted work

Payroll & Staff
Estimated annual payroll

Number of employees
Employee roles (field vs office)
Use of subcontractors
Workers compensation history

Subcontractor Details

Do subcontractors carry their own insurance?

Certificates of insurance collected?

Estimated subcontractor cost per year

Types of subcontracted trades

Current Insurance

Current insurance carrier

Policy expiration date

General liability limit

Workers compensation carrier

Umbrella coverage (if any)

Recent claims in last 5 years

Documents to Prepare

Contractor license

Current certificates of insurance

Payroll report or estimate

Loss runs (3–5 years if available)

Sample contracts or agreements

This worksheet helps prepare the information most carriers request when quoting contractors insurance. Providing these details early allows advisors to identify eligible markets and reduce underwriting delays.