



# PROPOSAL KIT SAMPLE

## Insurance Coverage Services Sample Proposal

Scroll down to read the first part of this sample. When purchased, the complete sample is 8 pages long and is written using these Proposal Pack chapters:

Cover Letter, Title Page, Cost Summary, Coverage, Services Provided, Experts, Policies, Back Page

This sample was created using **Proposal Pack Insurance #2**. In the retail Proposal Pack you get the entire collection of samples (including this one) plus thousands of editable templates for creating an unlimited variety of custom proposals and other business documents.

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The sample below **does not** include all of the sample's content. The complete version is included in every retail Proposal Pack product and must be purchased to see the rest of the content and to get the editable Word format version.

Read this article for more help - [How to Write an Insurance Business Proposal](#)

Dr. Loyd Foster  
Senior Partner  
New U Therapy Clinic  
1313 E. Baker Street  
Suite 300  
Burlington, WA 98233

Dr. Foster,

I enjoyed meeting you and your partners last week at your clinic offices.

Enclosed please find a statement of and cost summary for the insurance coverage we recommend, tailored for your specific needs, as well as some general information about our services and team members.

We look forward to working with you.

Sincerely,

Mike Yamashiro  
Northwest Business Representative  
WWA Insurance Inc.  
555-555-5555  
[mike@WWA-Insurance.com](mailto:mike@WWA-Insurance.com)  
[www.WWA-Insurance.com](http://www.WWA-Insurance.com)



# QUOTE

## Business Insurance Coverage

Prepared for: Loyd Foster  
Senior Partner

Prepared by: Mike Yamashiro  
Northwest Business Representative





# COVERAGE

After touring your business offices at 1313 E. Baker Street, Suite 300, and reviewing your insurance needs, this is the coverage we recommend for your business:

► **Liability Insurance**

As you know, psychologists and therapists are at high risk for lawsuits. Therefore, we recommend a \$4 million dollar aggregate liability policy for your firm.

► **Property and Casualty Insurance**

We can combine property and casualty insurance in a policy to insure your leased offices and their contents against damage due to weather, negligence by the building owner or other tenants, your clients, or your employees. We recommend a \$750,000 policy for your business.

► **Life and Disability Insurance**

We recommend that you insure each of your partners with \$1 million of life and disability insurance.

See the Cost Summary page for prices for this coverage.





# POLICIES

WWA Insurance Inc. offers the following types of insurance for businesses.

▶ **Liability Insurance**

This provides coverage in the event that your company or one of your employees is sued for negligence.

▶ **Casualty Insurance**

This provides coverage in the case of damage or loss to your business caused by property damage, employee theft, terrorism or other crimes.

▶ **Property Insurance**

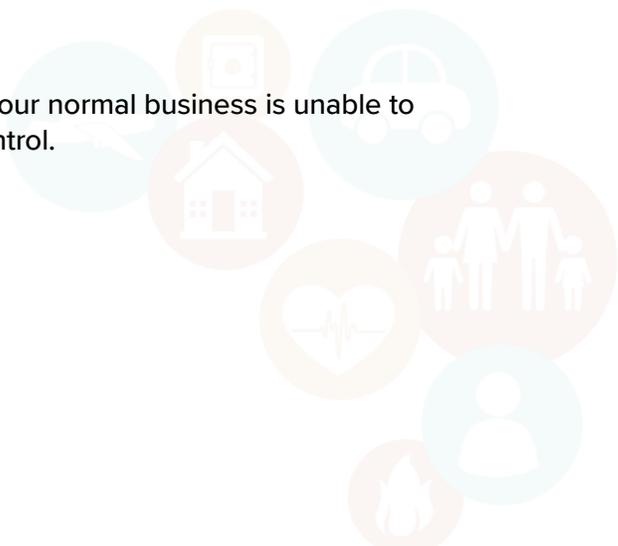
This provides coverage in the case of damage to your place of business. All contents at that location are included under the policy. Property insurance can be customized to include flood insurance, earthquake coverage, wind damage and other potential threats.

▶ **Life and Disability Insurance**

This protects the business in the event that one of your key employees dies or becomes disabled.

▶ **Business Interruption Insurance**

This covers your losses in the event that your normal business is unable to operate due to a disaster beyond your control.





# SERVICES PROVIDED

We provide the following services to all our insurance customers.

▶ **Initial Analysis of Your Insurance Needs**

Like many business owners, you may not be quite sure of the type and amount of insurance coverage you need. Our representatives travel to your place of business, where you can show them around and describe your business operations. Then we can recommend the best insurance to keep you operating in the black.

▶ **Immediate Attention to Claims**

If you need to make a claim, our operators are online 24 hours a day, 7 days a week to take your call. Our adjustors generally arrive within 24 hours. Most claims are settled within two weeks.

▶ **Annual Review of Your Insurance Needs**

As time goes on, your business insurance needs will change. You may be doing a larger volume of business or operating in different areas, have more or fewer employees, or own more or different property or equipment. Each year we will sit down with you to review your coverage and be sure it matches your current needs.

▶ **Assistance with Emergency Needs**

If disaster strikes, you may find that you suddenly need transportation or lodging, medical evacuation assistance, quick rentals of vehicles or equipment, temporary personnel, an emergency loan, and so forth. We're here to help our clients with 24/7 phone assistance and helpful connections with our broad network of affiliates. If we cannot resolve your issue over the phone, rest assured that our associates will show up in person.

▶ **Easy Processing with Online Forms**

You do not need to reinvent the wheel when delivering or updating your information about personnel, property, equipment, or inventory. Our online forms work with most common word-processing, database, and spreadsheet programs, so you can easily import or copy-and-paste information.



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### **How do I customize or create my own version of this sample?**

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- 1) After purchasing, downloading, and installing your Proposal Pack and Wizard software add a new project in the Wizard.
- 2) Click the Pick Documents button then click the View Samples tab.
- 3) Select the title of this (or any other) sample and click the Import Content from Selected Sample button.
- 4) Customize the chapter list as needed to suit your situation. You can add additional chapters from the library of 2000+ topics, reorder chapters, remove chapters.
- 5) When you save your project, the Wizard will build you a custom version of this sample in the visual design theme Proposal Pack you purchased applying all your customizations (logos, font types, color schemes, contact information, etc.).
- 6) Open and edit the Word document to complete your work.

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This sample has been truncated to only show the first few pages. The complete version of this sample including an editable Word version is included with all Proposal Kit Professional and Proposal Pack products found at:

[ProposalKit.com/htm/proposal-software-products.htm](http://ProposalKit.com/htm/proposal-software-products.htm)

