



<b>Title:</b> Added Named Insured: Record Keeping Guidelines	<b>Policy No.:</b> <b>B.04-01</b>
<b>Section:</b> <b>14</b>	<b>Page No.:</b> 1 of 2

<b>Legislation Reference:</b>	Jubilee Insurance Agencies Ltd.
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<b>Purpose:</b>	To help the added named insured community organizations develop an insurance record keeping system that is efficient and easy to maintain.
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**Policy Statement and Guidelines:**

**1. STATEMENT:**

To ensure continuity, consistency, and accuracy of record-keeping is maintained by the Added Named Insured Community Organizations.

**2. GUIDELINES:**

FILE CATEGORY	RECOMMENDED CONTENT
<b>Jubilee Insurance Program: Documentation</b>	<ul style="list-style-type: none"> <li>▶ Overview of Jubilee Insurance Program.</li> <li>▶ List of Prohibited and Restricted Risks.</li> <li>▶ Insurance Certificates – all coverage lines.</li> <li>▶ Asset Schedules: Buildings &amp; Contents / Mobile Equipment / Automobiles.</li> <li>▶ Copies of your organization’s most current completed application form and letter of understanding with Smoky Lake County.</li> <li>▶ Appraisal reports for your building and/or contents.</li> </ul>
<b>Maintenance: Logs</b>	<ul style="list-style-type: none"> <li>▶ Copies of maintenance sheets in date order.</li> <li>▶ Maintenance contracts.</li> <li>▶ Independent fire or building inspection.</li> </ul>
<b>Facility Inspection: Forms</b>	<ul style="list-style-type: none"> <li>▶ Facility inspection forms in date order.</li> <li>▶ Copies of building or equipment repair invoices.</li> </ul>
<b>Facility Rental: Agreements</b>	<ul style="list-style-type: none"> <li>▶ Facility rental agreements in date order.</li> <li>▶ Pre- and post-rental inspection forms.</li> <li>▶ Certificates of insurance from renters.</li> </ul>

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<b>Policy Statement and Guidelines:</b>	
<b>FILE CATEGORY</b>	<b>RECOMMENDED CONTENT</b>
<b>Incident: Reports</b>	<ul style="list-style-type: none"> <li>▶ Copies of incident reports in date order.</li> <li>▶ Copies of all photographs, witness statements or other documentation relating to each incident.</li> <li>▶ Copies of claims-related documents, such as correspondence with claim adjusters.</li> </ul>
<b>Waiver Forms</b>	<ul style="list-style-type: none"> <li>▶ Copies of waivers in date order.</li> <li>▶ Copies</li> </ul>
<b>Correspondence / Minutes</b>	<ul style="list-style-type: none"> <li>▶ Correspondence related to the use and operation of your building.</li> <li>▶ Copies of minutes of board meetings</li> </ul>

**Record-Keeping Guidelines structure and contents  
is recommended by  
Jubilee Insurance Agencies Ltd.**

**All signed documents  
should be safely stored  
for a period of not less than 7 (seven) years.**

	<b>Date</b>	<b>Resolution Number</b>
<b>Approved</b>	<b>February 19, 2009</b>	<b># 253-09 - Page # 8872</b>
<b>Amended</b>		
<b>Amended</b>		