CRES℠
A Gallagher Company

Workers' Compensation Application (CA)

This application must be completed by the Licensed Broker or designee on behalf of the firm and signed by an owner, officer or principal of the firm.

P.O. Box 4142 | Clinton, IA 52733 | P: 858.618.1648 | F: 858.618.1655 | cresinsurance.com

Please note: If you have specific requirements for a General Liability policy, please include them with your application. A quotation cannot be provided unless all questions are completed.

General Information

Named Insured: _____

DBA: _____

Physical Address: _____

Mailing Address (*if different*): _____

Primary Contact: _____ Email: _____

Entity Type: ☐ Sole Proprietor/Individual ☐ Corporation ☐ LLC ☐ Partnership

Effective Date: _____ FEIN: _____ Years in Business: _____

For any additional locations, please provide a separate and complete questionnaire (pages two and three).

Underwriting Questions

☐ Yes ☐ No Do you offer a health plan for your employees/independent contractors?

☐ Yes ☐ No Are you a member of the National Federation of Independent Businesses (NFIB)?

If yes, please provide your membership number: _____

☐ Yes ☐ No Do you have more than 50% ownership in any other business?

If yes, please describe: _____

☐ Yes ☐ No Do any employees/independent contractors work from home?

☐ Yes ☐ No Have you experienced any tax liens or bankruptcy in the last five (5) years?

☐ Yes ☐ No Do you have active or current workers' compensation insurance?

☐ Yes ☐ No Have any workers' compensation claims been filed in the last five (5) years?

Please provide the current provider: _____

Owners, Officers and Partners

California Workers' Compensation law allows certain officers, owners and partners to be excluded from coverage. Corporate officers or directors owning at least 10% of the corporation's stock may elect exclusion, while general partners and sole proprietors are ***automatically*** *excluded unless they opt for inclusion by endorsement. Included individuals must adhere to WCIRB minimum and maximum payroll guidelines, and a signed waiver is required for exclusions.*

Name: _____ Title: _____

Ownership Percentage: _____

Estimated Annual Compensation (including commissions for independent contractors and agents, as required by law):

_____

Include/Exclude: _____

Name: _____ Title: _____

Ownership Percentage: _____

Estimated Annual Compensation (including commissions for independent contractors and agents, as required by law):

_____

Include/Exclude: _____

Name: _____ Title: _____

Ownership Percentage: _____

Estimated Annual Compensation (including commissions for independent contractors and agents, as required by law):

_____

Include/Exclude: _____

Name: _____ Title: _____

Ownership Percentage: _____

Estimated Annual Compensation (including commissions for independent contractors and agents, as required by law):

_____

Include/Exclude: _____

8741 — Real Estate Sales Only

Use this for employees or independent contractors engaged in real estate sales activities. Examples: Real estate agents and brokers selling or leasing properties.

Full-Time Employees and Agents: _____ Part-Time Employees and Agents: _____

Estimated Annual Compensation (including commissions for independent contractors and agents, as required by law)**:**

8740 — Real Estate Agencies (Offsite Property Management)

*Use this for employees performing offsite management of **residential or non-residential properties**. Examples: Administrative tasks, such as leasing, tenant relations, accounting and financial management performed **at an office location**. Notes: Includes both residential and commercial property management when work is performed **offsite**. Does **not** include onsite property operations or maintenance.*

Full-Time Employees and Agents: _____ Part-Time Employees and Agents: _____

Estimated Annual Compensation (including commissions for independent contractors and agents, as required by law)**:**

9011 — Residential Apartment or Condominium Complex Operation (Onsite Residential Property Operations)

*Use this for employees performing **onsite management** and operations of **residential properties**, like apartments or condominiums. Examples: Maintenance, janitorial services, landscaping and tenant-focused operations performed at the property.*

Full-Time Employees and Agents: _____ Part-Time Employees and Agents: _____

Estimated Annual Compensation (including commissions for independent contractors and agents, as required by law)**:**

9012 — Building Operation — Commercial Properties (Onsite Management and Operation of Commercial Properties)

*Use this for employees involved in **onsite management** and operations of **non-residential properties**, such as office buildings, retail spaces or warehouses. Examples: Maintenance, janitorial services, landscaping and general building operations performed onsite.*

Full-Time Employees and Agents: _____ Part-Time Employees and Agents: _____

Estimated Annual Compensation (including commissions for independent contractors and agents, as required by law)**:**

8743 — Mortgage Brokering and Escrow Activities Only

Use this for employees involved in mortgage brokering or escrow activities. Examples: Loan officers, escrow agents or employees handling mortgage-related transactions.

Full-Time Employees and Agents: _____ Part-Time Employees and Agents: _____

Estimated Annual Compensation (including commissions for independent contractors and agents, as required by law)**:**

8810 — Clerical Only

Use this for employees performing strict clerical or administrative tasks in an office setting with no exposure to property operations. Examples: Office staff handling paperwork, accounting, data entry or administrative support. Notes: Employees must not visit properties, show units or perform any fieldwork.

Full-Time Employees and Agents: _____ Part-Time Employees and Agents: _____

Estimated Annual Compensation (including commissions for independent contractors and agents, as required by law)**:**

Signature: _____ Title: _____ Date: _____