

Purpose and Use:

This form enables every church to document the existence and adequacy of the church's insurance as outlined in the minimum insurance requirements put forth by the General Council on Finance and Administration (§ 2533.2 of the *Book of Discipline*).

The board of trustees are required to submit its review of the adequacy of coverage to the charge conference each year (§ 2550.7) along with recommendations needed to timely bring the church into compliance with the published schedule (§ 2533.2).

Instructions:

1. Please complete each section of the form.
2. Your six-digit GCNO can be found on www.umdata.org using the link provided. Simply provide enough identifying information to locate your church's record and copy the GCNO from the upper righthand corner of the screen into the box provided on the form.
3. Dates are in a m/d/yy format (e.g. 7/15/22) and can be typed in or selected from the calendar using the tab on the right of the box that will appear when you enter that box.
4. Click on the appropriate option in the boxes with lists to change your selection if it does not match the highlighted default selection.
5. The information you need can be found in each of the declaration pages of the applicable policies.
6. Your insurance agent should be able to help you with any information you cannot locate or any questions you may have about the requested data.

NOTE: If you are insured through the United Methodist Insurance Program, you will receive a form with the coverages you have with the program pre-filled for you (**still in development**).

General Council on Finance and Administration
Insurance Worksheet



Church name	Prepared by
Date (m/d/yy)	Email

GCNO. (Can be found at www.umdata.org)

PROPERTY COVERAGE	Insurance Company	Renewal Date (m/d/yy)	Total Value Building & Contents	Basic Deductible
Total - Building and Contents				
Co-insurance %	Property Valuation Method	Wind/Hail Deductible (if any)		
Has a commercial replacement cost appraisal been completed in the last 3 years?				
Does the policy include inflation guard coverage?				
Does the policy provide blanket property coverage?				
Does the policy include an agreed value endorsement?				

CASUALTY COVERAGE	Insurance Company	Renewal Date (m/d/yy)	Per Occurrence Limit	Aggregate Limit
Insured items:				
Commercial General Liability				
Pastoral Counseling Liability				
Sexual Misconduct Liability				
Hired & Non-Owned Auto Liability				
Hired & Non-Owned Auto - Physical Damage				
Employee Benefits Liability				
Medical Payments				
Umbrella Liability				
Crime/Employee Dishonesty Coverage				

Director & Officer's/Employment Practices Liability Coverage	Insurance Company	Renewal Date (m/d/yy)	Per Claim Limit	Aggregate Limit
Director's & Officer's Liability				
Employment Practices Liability				

Treasurer Surety Bond	Is a Bond in Place?	Insurance Company	Renewal Date (m/d/yy)	Limit
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Workers' Compensation Coverage	Insurance Company	Renewal Date (m/d/yy)	Per Occurrence Limit	Aggregate Limit
Bodily Injury by Accident - Each Accident				
Bodily Injury by Disease - Policy Limit				
Bodily Injury by Disease - Each Employee				

Commercial Auto Coverage	Applicable?	Insurance Company	Renewal Date (m/d/yy)	Auto Liability Limit
Commercial Owned Auto				