BLACK SHEEP FIELD TOOLS

The Black Sheep Contracting File

Five essentials. One organized place to start.

A personal checklist for building and maintaining your contracting folder.

01 DOCUMENT

Errors & Omissions Insurance

Keep the current certificate or policy declaration page.

☐ READY ☐ NEEDS UPDATE

SAVED AS / FOLDER _____ **EXPIRATION OR COMPLETED DATE** _____

02 DOCUMENT

Resident Insurance License

Save a clear, current copy from your resident state.

☐ READY ☐ NEEDS UPDATE

SAVED AS / FOLDER _____ **EXPIRATION OR COMPLETED DATE** _____

03 DOCUMENT

AHIP Certification

Keep the current plan-year completion certificate.

☐ READY ☐ NEEDS UPDATE

SAVED AS / FOLDER _____ **EXPIRATION OR COMPLETED DATE** _____

04 DOCUMENT

Other Certifications

Carrier, product, AML and state-specific training certificates, when applicable.

☐ READY ☐ NEEDS UPDATE

SAVED AS / FOLDER _____ **EXPIRATION OR COMPLETED DATE** _____

05 DOCUMENT

Completed W-9

Keep a current signed copy; confirm the name and tax information match your applications.

☐ READY ☐ NEEDS UPDATE

SAVED AS / FOLDER _____ **EXPIRATION OR COMPLETED DATE** _____

Still needed / next renewal

_____

_____

Keep it yours.

This organizer does not send files to Black Sheep. Store documents securely on your own device or approved system. Share sensitive files only through an authorized contracting process.