

## CERTIFICATES OF INSURANCE REQUEST CHECKLIST

### HOW TO OBTAIN A CERTIFICATE OF INSURANCE FOR AN EVENT THAT IS COVERED UNDER THE DISTRICT POLICY:

1. Review the “EVENT COVERAGE” TAB on the district website to ensure your event does not require a separate special events liability.
2. If your event is not listed on the list of excluded events, please contact our broker 15-30 days prior to the event whenever possible:

**Wilson M Beck Insurance has created an email address for all rotarian inquiries:**

EMAIL: [rotary@wmbeck.com](mailto:rotary@wmbeck.com)  
PH# 236-425-1770

COMPLETE THE FILLABLE CERTIFICATE REQUEST FORM

- *Provide the name of your Rotary Club and District*
- *Provide Date (s) of the event*
- *Provide a brief description of the event.*
  - *Some examples of events are*
    - *Auction*
    - *Fundraising Dinner*
    - *Duck Races*
    - *Golf Tournament*
- *Anticipated number of attendants*
- *Whether or not your club is organizing the entire event or simply providing volunteers.*
  - *If it is your club:*
    - *Will there be any Vendors at the event? If so, what type?*
      - *See EVENT COVERAGE TAB for Risk Management recommendations.*
- *Who is asking for the Certificate*
  - *If no one is asking and the intent is to simply notify the broker of the event no further information is required.*
  - *If a company, mall, municipality, venue owner etc. is requesting the certificate the following additional information is required:*
    - *Full legal name of the entity asking for the certificate*
    - *Their complete mailing address.*
    - *Also if they are requesting to be listed as an “additional insured” they will ask for this when they request a certificate from you. If they do not ask you, don't ask them.*

The general policy for the District covers all Rotary Club Members and Volunteers including:

- Rotarians, Rotaract and Interact members
- Volunteers who are working on behalf of Rotary at a Rotary-sponsored event
- Families of Rotarians who are working on behalf of Rotary at a Rotary-sponsored event