MontRidge Insurance Services

ENVIRONMENTAL CONSULTANTS CHECKLIST

Commercial Risk Education Series

A practical self-assessment to help identify insurance and operational risk topics for further discussion. Select Yes, No or Not Sure for each item. Leave items that do not apply blank. There is no score or passing grade.

SERVICES

	Yes	No	Not Sure
Are all consulting and testing services accurately described?	○	○	○
Are field sampling and laboratory responsibilities documented?	○	○	○
Are subcontracted technical services reviewed?	○	○	○
Are report reliance and intended users defined?	○	○	○

PROFESSIONAL RISK

	Yes	No	Not Sure
Are limitations and assumptions stated in reports?	○	○	○
Are peer review procedures documented?	○	○	○
Are sampling records and chain of custody retained?	○	○	○
Are errors and omissions reporting procedures established?	○	○	○

MontRidge Insurance Services

ENVIRONMENTAL CONSULTANTS CHECKLIST

Commercial Risk Education Series

Continue your review. Select one response per item; leave non-applicable items blank.

INSURANCE

	Yes	No	Not Sure
Are professional liability and pollution policies compared?	○	○	○
Are retroactive dates and continuity reviewed?	○	○	○
Are bodily injury and property damage exclusions understood?	○	○	○
Are subcontractor and contractual liability provisions evaluated?	○	○	○

CONTRACTS

	Yes	No	Not Sure
Are scope and deliverables clearly defined?	○	○	○
Are indemnity and limitation-of-liability clauses reviewed by counsel?	○	○	○
Are additional insured requirements evaluated where relevant?	○	○	○
Are records retained according to applicable obligations?	○	○	○

MontRidge Insurance Services

ENVIRONMENTAL CONSULTANTS CHECKLIST

Commercial Risk Education Series

NEXT STEPS

Use your responses to identify questions for your insurance advisor. A No or Not Sure response may warrant further review; a Yes response does not establish adequate insurance or compliance. Keep the completed checklist for your own records.

OPTIONAL CONSULTATION REQUEST

- [ ] I would like to discuss this checklist with Montridge.
- [ ] I would like to review my current insurance program.
- [ ] I would like to receive future educational resources.

OPTIONAL CONTACT INFORMATION

Name

Company

Title

Phone

Email

Preferred contact method

Questions or topics to discuss (avoid confidential or sensitive information)

To arrange a discussion, visit www.montridgeinsurance.com. This PDF does not transmit your responses automatically.

Educational use only. This checklist is not an insurance application, policy, coverage determination, compliance audit, or legal, tax, engineering, medical or financial advice. Coverage depends on actual policy terms, endorsements, exclusions and facts. Consult qualified advisers for your circumstances.