

Broker Setup Packet Checklist

Track the carrier documents requested by this broker. Confirm applicability and the correct delivery contact before sending.

Carrier / company		Broker name / MC number	
Broker contact / verified destination		Setup reference / requested date	
Document	Requested? Y / N	Applicable? Y / N	Sent date / method / reference
Carrier contact / company information			
Authority document, if requested			
Certificate of insurance from authorized source			
Completed official IRS W-9 via secure delivery			
Broker-carrier agreement supplied by broker			
Factoring notice / payment direction, if applicable			
SCAC or other identifier, if requested			
Other requested document			

Before sending

- ☐ Recipient and delivery destination verified independently
- ☐ Current documents obtained from their proper issuers
- ☐ Sensitive information sent by an appropriate secure method
- ☐ Unnecessary personal or bank information omitted
- ☐ Requested agreement reviewed separately by an authorized person

Missing items / follow-up person / due date	
Sent by / date	Broker receipt / follow-up reference

Use current documents from the carrier or their authorized issuers. Record missing items and confirm that the broker received the packet.