



Event Planner Vendor Checklist: What to Request From Vendors

Collecting proof of insurance before an event? This reusable checklist for event planners helps you request the right paperwork, track coverage, and verify COIs. Requirements vary, but once you know the basics, you can feel event-ready every time.

See all the details in the [Guide to Vendor Insurance for Event Planners](#).

Event Details (Set These First)

Event name: _____

Event date(s): _____

Venue name and address: _____

Venue contact phone number and email: _____

Your company name: _____

COI due date (your internal deadline): _____

Venue Requirement Snapshot

Required liability limits (for example, \$1M per occurrence / \$2M aggregate): _____

Required endorsements (Additional Insured, Waiver of Subrogation, Primary & Noncontributory, etc): _____

COI requests (COI only or endorsement page attached): _____

Vendor Insurance Tracker (Repeat for Each Vendor)

• Vendor company name and contact: _____

• Coverage needed (check all that apply):

- General Liability
- Commercial Auto
- Workers Compensation
- Liquor Liability
- Professional Liability (E&O)
- Equipment Insurance
- Higher Limits / Umbrella

- COI received
- Endorsement received (if required)
- Verified meets requirements

• Notes: _____

Verify Vendor COIs: The 5-Minute Self-Check (Use Every Time)

- Legal names match the contract (vendor, venue, and/or client legal names spelled correctly).
- Policy dates cover setup + event day + teardown (not just the event date)
- Limits meet requirements and are listed under the right coverage type (General Liability, Liquor Liability, etc.)
- Additional Insured is included when required (and endorsement page is attached, if requested).

Need help getting coverage that matches requirements? Check out Insurance Canopy for customizable Vendor Insurance, Event Host Insurance, and Event Planner Insurance.

