

INITIAL INSPECTION

"Turn to us when they turn you down"

- Wheeler, DiUllo & Barnabei, P.C.

Did you do/do you have?	Yes	No	Comment (Why Not)
Full Policy (Check Online) (Minimum Req. Dec Pages)	<input type="checkbox"/>	<input type="checkbox"/>	
Pre-loss Photos from Client (Holidays/events)	<input type="checkbox"/>	<input type="checkbox"/>	
Take Current Photos (Wide then close-up)	<input type="checkbox"/>	<input type="checkbox"/>	
Video Walkthrough	<input type="checkbox"/>	<input type="checkbox"/>	
Contract Signed	<input type="checkbox"/>	<input type="checkbox"/>	
Carrier Authorization Signed	<input type="checkbox"/>	<input type="checkbox"/>	
Check Authorization Signed	<input type="checkbox"/>	<input type="checkbox"/>	
Measurements	<input type="checkbox"/>	<input type="checkbox"/>	
Major Repair/Reno Invoices	<input type="checkbox"/>	<input type="checkbox"/>	
Current Estimates from Client	<input type="checkbox"/>	<input type="checkbox"/>	
Invoices relating to loss	<input type="checkbox"/>	<input type="checkbox"/>	
Prior Loss History	<input type="checkbox"/>	<input type="checkbox"/>	
Client Contact Info (Phone/email)	<input type="checkbox"/>	<input type="checkbox"/>	
Secondary Contact Info (Phone/email)	<input type="checkbox"/>	<input type="checkbox"/>	
Damage Review with Client (Structure and Contents)	<input type="checkbox"/>	<input type="checkbox"/>	
Client Expectation Review (What do they want/expect)	<input type="checkbox"/>	<input type="checkbox"/>	
Narrative From Client (what happened)	<input type="checkbox"/>	<input type="checkbox"/>	
Other Proofs (Heating bills, proof of residency,	<input type="checkbox"/>	<input type="checkbox"/>	
Referral Source	<input type="checkbox"/>	<input type="checkbox"/>	
Set and Discuss Plan and Next steps with insured	<input type="checkbox"/>	<input type="checkbox"/>	

KEY THINGS TO REMEMBER

1. Always set the proper expectation.
2. Warn about insurance company tactics, including, but not limited to:
 - a. Adjuster Changes
 - b. Re-inspection delays
 - c. "investigation" delays
 - d. Document request delays
 - e. Expert usage delays
3. Use your honesty to build confidence in you
4. Explain the timeline (Short, Long, Average)
5. Prepare for the worst, hope for the best

Need Help or Have Questions?

Call or email

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