



RISK MANGEMENT PLANNING TEMPLATE

Step 1 – Identification of risk: _____

Step 2 – Type of risk: _____ Premise _____ Liability _____ D&O _____ Fidelity _____ Workers Comp _____

_____ Cyber _____ Other _____

Step 3 – Insurance Policy(s) applicable: _____

Step 4 – Insurance Policy(s) limitations and conditions:

Type of Insurance: _____

Limits of coverage: _____

Deductible(s): _____

Other Terms and Conditions: _____

Step 5 – Risk Mitigation Options (Maintenance plans, emergency action plans, policies, inspections, expert consultation, documentation, and communication): _____

Step 6 – Risk Management Team

Attorney: _____ Phone #: _____

Insurance agent: _____ Phone #: _____

Subject Matter Experts: _____ Phone #: _____

_____ Phone #: _____

_____ Phone #: _____

Step 7 – Communication Protocol: _____
