



# Package Checklist for Shipper and Carrier

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Remember each company is different and some documents may be worded different within their own packages. Listed below is the basic flow of getting set up with a new shipper or carrier.

## **Check List for Documents In your packages for shipper**

- ✓ Shipper Broker Contract (Last Page Signed Sent Back To Broker)
- ✓ Shipper Credit Profile (Shipper Might have their own already)
- ✓ Signed W9 by Firm for shipper ( For tax purposes )
- ✓ Firm Copy Of BMC-85 (Surety Bond)
- ✓ Firm Copy of Contingent Cargo (\$100,000)
- ✓ Firm Company Profile with Agents Contact Info
- ✓ Copy Of Brokers Authority

## **Shipper will send back to broker:**

- ✓ Signed Shipper Broker Contract
- ✓ Credit profile

## **Check List for Documents In your carrier packages**

- ✓ Broker Carrier Contract (Last Page Signed Sent Back To Broker)
- ✓ Carrier Data Profile (Carrier might have their own already)
- ✓ Carrier Company Profile (This includes equipment)
- ✓ Signed W9 by Carrier (For tax purposes)
- ✓ Firm Copy Of BMC-85 (Surety Bond )
- ✓ Firm Copy of Contingent Cargo
- ✓ Firm Company Profile with Agents Contact Info
- ✓ Copy Of Brokers Authority

## **Carrier will send back to broker (Carriers have already their own package)**

- ✓ Signed Carrier Broker Agreement
- ✓ Carrier Data profile

- ✓ Carrier Company profile
- ✓ Carrier Certificate of Insurance for \$1,000,00 Liability minimum and \$100,000 Contingent cargo minimum
- ✓ Copy Of Carrier's Operating Authority
- ✓ Signed W9 Form
- ✓ Any Additional company documents included in their own package

**If you are working as a Broker, you will need to do the following:**

- ✓ Make sure the shipper has been credit checked with your factoring company.
- ✓ Input the Data and Shipper Information as well as upload all files into your TMS. (FMCSA Requires Record Keeping)
- ✓ Keep on file all contact information and emails pertaining to shipper.
- ✓ Request Load List so that you can begin to work with your carriers on placing them into the geographic locations.

## Example Of True Load List From Shipper :

Pickup	Pickup Location	Delivery	Delivery Location	Temp	Miles	Note
10/19/2022	POCAHONTAS, AR	10/21/2022	CHICAGO, IL	24	498	8PM PICK 1AM DELIVERY
10/19/2022	TUPELO, MS	10/20/2022	PEARL RIVER, LA	-10	308	11AM PICK/12:30AM DELIVERY
10/20/2022	KINSTON, NC	10/23/2022	DENVER, CO	28	1,754	LATE PICK / MORNING DELIVERY
10/21/2022	MACON, MS	10/24/2022	ST. PAUL, MN	-10	987	1PM PICK 8AM DELIVERY
10/21/2022	WOODVILLE, WI	10/23/2022	PEARL RIVER, LA	-10	1,170	10AM PICK/11PM DELIVERY
10/27/2022	TUPELO, MS	10/28/2022	PEARL RIVER, LA	-10	308	11AM PICK/2AM DELIVERY
10/29/2022	LUFKIN, TX	10/31/2022	PEARL RIVER, LA	-10	351	
10/31/2022	LUFKIN, TX	11/01/2022	PEARL RIVER, LA	-10	351	
10/31/2022	TUPELO, MS	11/01/2022	PEARL RIVER, LA	-10	308	2AM DELIVERY
10/31/2022	LINCOLN, NE	11/02/2022	PEARL RIVER, LA	-10	1,011	11PM DELIVERY
11/01/2022	LINCOLN, NE	11/03/2022	PEARL RIVER, LA	-10	1,011	
11/01/2022	LINCOLN, NE	11/03/2022	PEARL RIVER, LA	-10	1,011	
11/01/2022	TUPELO, MS	11/02/2022	KANSAS CITY, KS	-10	568	
11/01/2022	BAYTOWN, TX	11/02/2022	PEARL RIVER, LA	-10	337	

Always ask the right questions before picking up the load !