Boilerplate exception record

Prepare one specific scenario for counsel, the insurance reviewer and the person authorized to accept the business exception. Complete against the draft that will go to signature.

Fictional example
The master caps fees, Schedule B lists exceptions, and a security rider adds a defense obligation.

Build the review packet

Agreement and reviewed version

Party, service and business owner

Loss scenario and clauses in tension

Cap, carve-outs and indemnity references

Insurance, rider and priority references

Record separate specialist decisions

Counsel's position, scope and decision reference

Risk or broker evidence still needed and conclusion

Authorize the exception

Playbook position and requested fallback

Approving role or named delegate

Decision, conditions, date and approved version

Who rechecks changes before signing?

Follow-up date or trigger