Carrier information sheet

Reusable business details for broker setup. Complete only what applies.

Use this sheet alongside the recipient's forms and document requests.
The broker supplies its agreements and decides what it needs for approval.

1. Business and contact details

Carrier legal business name

Trade name / DBA, if used

USDOT number, if applicable

MC number, if applicable

Business address (street, city, state and ZIP)

Main contact name

Main contact phone

Main contact email

Equipment type(s)

Operating area / lanes

Dispatch contact, if different

Dispatch phone / email, if different

Additional service details

Leased onto another carrier? Confirm who handles setup and which carrier identity to use.
Fill in a PDF reader and save a copy, or print and write. This PDF does not submit information.
Keep tax identifiers and bank details in the recipient's approved forms and secure process.

Packet preparation organizer

Keep one copy for each broker or customer. This is your working record.

Start with the recipient's current requirements. An item may not apply to your operation.
Carrier setup and a specific load booking are separate steps.

2. Recipient and submission process

Broker / customer name

Contact name

Contact email / phone

Verified portal or submission instructions

3. Requested attachments

Check Requested first; check Ready after you have prepared the item.

	Requested	Ready
Carrier identity / authority records	☐	☐
Requested tax form	☐	☐
Current insurance certificate	☐	☐
Recipient's agreement and onboarding forms	☐	☐
Equipment and service information	☐	☐
Remittance / factoring instructions through approved process	☐	☐

4. Submission and follow-up

Submitted on (date)

Next follow-up (date)

Status / reply received

Other requests, corrections or next action