

# Homeowners Insurance Quote Sheet

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Name of Insured(s) \_\_\_\_\_ Phone number \_\_\_\_\_

E-mail address \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ County \_\_\_\_\_ Zip Code \_\_\_\_\_

1<sup>st</sup> Named Insured DOB \_\_\_\_\_ SS# \_\_\_\_\_ Current Insurance is with \_\_\_\_\_

2<sup>nd</sup> Named Insured DOB \_\_\_\_\_ SS# \_\_\_\_\_ Policy Expiration Date \_\_\_\_\_

A copy of your current policy declarations page would be helpful for you to send to us as well.

Current Dwelling amount \_\_\_\_\_ Liability Limit \_\_\_\_\_ Deductible \_\_\_\_\_

Scheduled Items: Jewelry \$ \_\_\_\_\_ ; Other \_\_\_\_\_ \$ \_\_\_\_\_ We will need appraisals and or receipts for each item

Construction Type: \_\_\_\_\_ Style of Home \_\_\_\_\_ What type of siding \_\_\_\_\_, Roof \_\_\_\_\_

Any Stucco \_\_\_\_\_ #of Stories \_\_\_\_\_ Square footage per floor \_\_\_\_\_ Basement \_\_\_\_\_ Finished or Unfinished \_\_\_\_\_

Garage – Detached or attached or tuck under # of Stalls \_\_\_\_\_ Any dogs and what Breed(s) \_\_\_\_\_

Pool or Hot Tub \_\_\_\_\_ Diving Board \_\_\_\_\_ Is the pool area fenced in and locked? \_\_\_\_\_ Trampoline \_\_\_\_\_

Deck \_\_\_\_\_ sq. ft. \_\_\_\_\_ Deck \_\_\_\_\_ Sq.Ft. \_\_\_\_\_ Original year home was built \_\_\_\_\_

Fireplace \_\_\_\_\_ # of Chimney's \_\_\_\_\_ # of Bedrooms \_\_\_\_\_ # of Baths \_\_\_\_\_ **Year Purchased** \_\_\_\_\_ **Purchase Price** \_\_\_\_\_

Year Roof replaced \_\_\_\_\_ Year wiring updated \_\_\_\_\_ 100 or 200 amp service or Fuses? \_\_\_\_\_

Year plumbing was updated \_\_\_\_\_ Year Heating A/C updated \_\_\_\_\_ A/C Central or windows? \_\_\_\_\_

Any other special features in the home? \_\_\_\_\_

Security System \_\_\_\_\_ What Type \_\_\_\_\_ Central Alarm credits require an alarm certificate from alarm company

Do you own any watercraft? \_\_\_\_\_ Year \_\_\_\_\_ Make \_\_\_\_\_ Model \_\_\_\_\_ Length \_\_\_\_\_

Inboard – Outboard- Inboard/outboard Horsepower \_\_\_\_\_ (#cc's) Equipment \$ amount \_\_\_\_\_

Boat VIN \_\_\_\_\_ Motor VIN \_\_\_\_\_ Trailer Value \_\_\_\_\_ VIN \_\_\_\_\_

What waters do you navigate? \_\_\_\_\_ Where is craft docked? \_\_\_\_\_ Drivers license # \_\_\_\_\_

Do you own any snowmobiles? \_\_\_\_\_ Four wheelers? \_\_\_\_\_ Three Wheelers? \_\_\_\_\_

Year \_\_\_\_\_ Make \_\_\_\_\_ Model \_\_\_\_\_

Primary home \_\_\_\_\_ Secondary \_\_\_\_\_ Fire Dwelling \_\_\_\_\_ Mobile Home \_\_\_\_\_ Renters Insurance \_\_\_\_\_

How did you find out about us? \_\_\_\_\_

Notes: \_\_\_\_\_

Information taken by \_\_\_\_\_ Date received \_\_\_\_\_

## Automobile Worksheet

**Insured – Full Name** \_\_\_\_\_ **Sex :** \_\_\_\_\_ **DOB:** \_\_\_\_\_

**Home address:** \_\_\_\_\_

**City:** \_\_\_\_\_ **State:** \_\_\_\_\_ **zip:** \_\_\_\_\_

**Home phone:** \_\_\_\_\_ **cell phone:** \_\_\_\_\_ **email:** \_\_\_\_\_

**Drivers License#** \_\_\_\_\_ **motorcycle endorsement:** \_\_\_\_\_

**S.S.#** \_\_\_\_\_

**Occupation:** \_\_\_\_\_ **Place of employ:** \_\_\_\_\_

**2<sup>nd</sup> insured – Full Name** \_\_\_\_\_ **Sex :** \_\_\_\_\_ **DOB:** \_\_\_\_\_

**Drivers License#** \_\_\_\_\_ **motorcycle endorsement:** \_\_\_\_\_

**S.S.#** \_\_\_\_\_

**Occupation:** \_\_\_\_\_ **Place of employ:** \_\_\_\_\_

**3<sup>rd</sup> insured – Full Name** \_\_\_\_\_ **Sex :** \_\_\_\_\_ **DOB:** \_\_\_\_\_

**Drivers License#** \_\_\_\_\_ **motorcycle endorsement:** \_\_\_\_\_

**S.S.#** \_\_\_\_\_

**Occupation:** \_\_\_\_\_ **Place of employ:** \_\_\_\_\_

If there are more drivers in the household please list them as well.

### VEHICLE INFORMATION:

**Yr/Make/Model** \_\_\_\_\_ **Vin:** \_\_\_\_\_

**Yr/Make/Model** \_\_\_\_\_ **Vin:** \_\_\_\_\_

**Yr/Make/Model** \_\_\_\_\_ **Vin:** \_\_\_\_\_

**Yr/Make/Model** \_\_\_\_\_ **Vin:** \_\_\_\_\_

**Current Insurance Co:** \_\_\_\_\_ **How long:** \_\_\_\_\_

**Current Limits per vehicle** \_\_\_\_\_

**Defensive Driver course** \_\_\_\_\_ **date taken** \_\_\_\_\_

**Do you own a home?** \_\_\_\_\_ **Do you have any recreational vehicles?** \_\_\_\_\_