

QUOTE SHEETS

COLLECTING CLIENT INFORMATION

Full Name:

Occupation:

Birthdate:

Driver's License #:

Primary Address:

Phone Number:

Email Address:

ADDITIONAL INSURED DRIVER:

Full Name:

Occupation:

Birthdate:

Driver's License #:

Primary Address:

Phone Number:

Relationship to Insured:

HOMEOWNERS INFORMATION COLLECTION

*Research Home Using: Zillow, Assessor Site, Google, and/or Appraisal if new or recent purchase.

HOME INFORMATION

1. Mailing Address (if different)?
2. Does the insured own, rent, or lease this property?
3. What is the occupancy of your home? Owner occupied? Tenant occupied? Vacant?
4. Roof replacement year (if any)?
5. Is there a pool (above or below ground)? If yes, is there a fence around the pool?
6. Is there any dogs? If so, what breed and is there any bite history?
7. Is the home currently insured? If yes, with what carrier?
8. Have any other carriers been quoted?
9. How do you prefer to pay the premium (i.e., escrow paid, insured full pay, insured monthly pay)?
10. Year built?
11. Type of roof?
12. Type of siding?
13. Square footage?
14. Number of levels?
15. Type of home (single family, condo, townhome)?
16. Any home-based business?
17. Name of management company if any?
18. Mortgagee clause & loan number (if available):
19. Any discounts available (home alarm, water shut off, gated community)?

AUTO INFORMATION COLLECTION

Mailing Address (if different):

ADDITIONAL INSURED DRIVERS' INFORMATION:

Name: Occupation:
 Date of Birth: Driver's License #:
 Primary Address:
 Phone Number:
 Relationship to Insured:

ACCIDENTS & MOVING VIOLATIONS

DRIVER: DATE: EXPLANATION:

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VEHICLE INFORMATION COLLECTION

VEHICLE 1 VIN:
 YEAR: MAKE: MODEL: USE: MILEAGE:

VEHICLE 2 VIN:
 YEAR: MAKE: MODEL: USE: MILEAGE:

VEHICLE 3 VIN:
 YEAR: MAKE: MODEL: USE: MILEAGE:

VEHICLE 4 VIN:
 YEAR: MAKE: MODEL: USE: MILEAGE:

COVERAGE & INSURANCE REQUIREMENTS

Currently insured?
 If so, with what carrier?

Current coverage limits?
 Liability/Property: Medical: Comprehensive: Collision:

What other carriers have you quoted?

Is the Insured open to participation in a telematics program for discounts?

Are any of the vehicles used for Uber, Lyft, or other courier service?

**Any Motorcycles/ATVs? Razors to quote?

**May we provide an Umbrella or Life quote?

