



# Personal Insurance Worksheet

This worksheet will help you prepare for all the questions we'll review to prepare your quote, so that we can provide you with the best insurance protection to fit your needs. Feel free to complete the entire worksheet now, or simply use it to fill in only the information you don't know off the top of your head.

If you get stuck, don't worry! We'll review everything together on our call to make sure you remain properly protected!

## Section 1: Contact Information

<b>Name</b>	<b>Name</b>
<b>Email</b>	<b>Email</b>
<b>Phone</b>	<b>Phone</b>
<b>Date of Birth</b>	<b>Date of Birth</b>
<b>Drivers License #</b>	<b>Drivers License #</b>
<b>Occupation</b>	<b>Occupation</b>
<b>Mailing Address</b>	
<b>Physical Address</b>	

## Section 2: Coverage History

### Your Existing Policies

Policy Type	Agent / Insurance Company	Policy #	Policy Dates
Auto			
Home/Renters/Condo			
Umbrella			
Other: _____			
Other: _____			
Other: _____			

- Have you ever had a policy been cancelled before? Y / N (if yes, reason for cancellation) \_\_\_\_\_
- (If yes) Do you have any premium still due to the insurance company? Y / N
- Have there been any claims or accidents on the property? Y / N
- Have you ever had any bankruptcies or foreclosures? Y / N
- Have you or any other drivers had any accidents or violations in the last few years? Y / N
- Do you have any pets? Y / N \_\_\_\_\_
- (If yes) Do any pets have a history of aggressive or biting behavior? Y / N \_\_\_\_\_



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## Section 3: Home/Renters/Condo Coverages

- Is this a new home purchase? Y / N (If yes) What is your anticipated closing date: \_\_\_\_\_
- Is your home currently being built, or under renovations? Y / N \_\_\_\_\_
- Is there any existing damage or unrepaired damage to your home? Y / N \_\_\_\_\_
- Has there ever been evidence of water leakage or seeping in the residence? Y / N \_\_\_\_\_
- Dwelling Limit \_\_\_\_\_  Pers. Property limit: \_\_\_\_\_
- Do you have any business property on premises? Y / N \_\_\_\_\_  
(If yes, where is it located (i.e. in home, detached structure, etc.? \_\_\_\_\_)
- Deductible \_\_\_\_\_
- Year Built. \_\_\_\_\_  Total Sq Ft \_\_\_\_\_  Is there a sump pump? Y / N
- Do you have any other structures (i.e. Porches, Patios, Decks, Shed, Garage, Barns, Coops, etc.) Y / N \_\_\_\_\_
- Any updates to home/ or any plans to renovate this year? (Heating, Electrical, Plumbing, Roof) Y / N \_\_\_\_\_  
\_\_\_\_\_
- Type of Heat? \_\_\_\_\_  Flooring? \_\_\_\_\_
- # of Bathrooms \_\_\_\_\_  Basement? Y / N % Finished/Unfinished \_\_\_\_\_
- Any special features (i.e. recessed lights, crown molding, fireplace, cathedral ceiling, etc.) \_\_\_\_\_
- Wood stove? \_\_\_\_\_  Solar panels? \_\_\_\_\_
- Pools/Ponds/Treehouses/Trampolines? \_\_\_\_\_
- Mortgage? Y / N Escrowed? Y / N \_\_\_\_\_
- Do you have a second, seasonal or vacation home? Y / N \_\_\_\_\_
- Do you have any rental/income properties? Y / N \_\_\_\_\_
- Do you have any items you'd like to specifically schedule? Y / N \_\_\_\_\_  
(For example: jewelry, collectibles/sentimental valuables, firearms, computers/electronics, cameras, sporting equipment, or drones)
- Anyone work from home? Y / N
- Anyone with access to home? (i.e. nanny, maid, etc.) Y / N
- Boats? Y / N \_\_\_\_\_
- Anyone volunteer or serve on any boards? Y / N \_\_\_\_\_
- Are you the trustee/executor of any estate? Y / N \_\_\_\_\_
- Do you have any children? Y / N \_\_\_\_\_
- Do you provide care for an elderly or disabled person? Y / N \_\_\_\_\_



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## Section 3: Auto Coverages

### Vehicles

Year	Make/Model	Plate #	Collision? (Y / N)	Comp? (Y / N)	Towing? (Y / N)	Rental? (Y / N)

- Deductible \_\_\_\_\_
- Any antique/classic cars or motorcycles? Y / N \_\_\_\_\_
- Any recreational vehicles? (travel trailers, RVs, campers, golf carts)? Y / N \_\_\_\_\_
- Any vehicles in your house that we aren't currently insuring? Y / N \_\_\_\_\_
- Do any vehicles have car seats installed? Y / N \_\_\_\_\_

### Drivers *(Please list all household members)*

Name	DOB	DL#	Which Vehicle Driven

- Are any drivers good students (B average or better)? Y / N \_\_\_\_\_
- Are any drivers currently living away at school? Y / N \_\_\_\_\_
- Anyone with access to vehicles not listed on policy? Y / N \_\_\_\_\_
- Anyone drive a company supplied vehicle? Y / N \_\_\_\_\_
- Anyone using vehicle for work? Y / N \_\_\_\_\_
- Anyone drive for Uber/Lyft or offer ride sharing services? Y / N \_\_\_\_\_
- Anyone commute or borrowing vehicles? Y / N \_\_\_\_\_
- Do you have AAA? Y / N \_\_\_\_\_
- Is there anyone 14 yrs or older or soon to be licensed? Y / N \_\_\_\_\_

