

# Insurance review checklist – your home policy

## HOME

Recent life changes can open up your eligibility for discounts or leave you inadequately covered. We can help you keep your home insurance up-to-date by conducting an insurance review.

Thank you for your time!



**By completing the questions below, we can help you assess your needs.**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Email address: \_\_\_\_\_

Preferred method of contact:  Phone  Email  Mail  Other: \_\_\_\_\_

Policies currently with agency (select all that apply):

- |  |  |
|--|--|
| <input type="checkbox"/> Auto          | <input type="checkbox"/> Wedding                   |
| <input type="checkbox"/> Home          | <input type="checkbox"/> Personal Articles Floater |
| <input type="checkbox"/> Renters/Condo | <input type="checkbox"/> Umbrella                  |
| <input type="checkbox"/> Dwelling/Fire | <input type="checkbox"/> Other                     |
| <input type="checkbox"/> Flood         |  |

Are you currently set up with an automatic payment plan?  YES  NO

– If not, would you be interested in learning more about different payment options that may offer a discount on your premium?  YES  NO

How would you rate the service that our agency provides? \_\_\_\_\_

What can we improve or provide to make your experience with us even better? \_\_\_\_\_

**Please indicate any upcoming changes\* you expect in the next year.**

- |  |   |  |
|--|---|--|
| <input type="checkbox"/> I will be graduating              | <input type="checkbox"/> I will be getting married    | <input type="checkbox"/> I will be having a child      |
| <input type="checkbox"/> My child will be graduating       | <input type="checkbox"/> I will be selling property   | <input type="checkbox"/> I will be starting a business |
| <input type="checkbox"/> My child will begin driving       | <input type="checkbox"/> I will be buying a home      | <input type="checkbox"/> I will be getting a pet       |
| <input type="checkbox"/> I will be buying property         | <input type="checkbox"/> I will be changing jobs      | <input type="checkbox"/> I will be retiring            |
| <input type="checkbox"/> I will be making a major purchase | <input type="checkbox"/> I will be selling a business |  |

\*If any of these changes have occurred in the past year, please indicate as well.

**Please select YES or NO.**

**YES**  **NO** Do you know if your current policy would cover the cost to rebuild your home in the event your home suffered an entire loss?

**YES**  **NO** Have you recently remodeled or made changes to the structure of your home?

**YES**  **NO** Do you have a swimming pool or large structure not attached to your home?

**YES**  **NO** Do you have a wood burning stove?

**YES**  **NO** If you rent or own a condo, do you have renters or condo insurance?

**YES**  **NO** Are you interested in flood insurance?

**YES**  **NO** Do you own valuable jewelry, furs, antiques, collectibles or sporting equipment?

**YES**  **NO** Have you recently installed a smoke detector, fire extinguisher, burglar or fire alarm?

**YES**  **NO** Do you have a home office or run a business out of your home? If so, what type of business?

**YES**  **NO** Do you have seasonal/rental properties that are not insured through this agency?

**YES**  **NO** Would you like a no-obligation quote for Identity Fraud coverage?

**YES**  **NO** Do you own a boat or yacht?

**YES**  **NO** Would you be interested in learning more about additional liability coverage?

**YES**  **NO** Do you know anyone else who could benefit from a no-obligation insurance review from our agency? If so, please provide their contact information below:

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