



Insurance review checklist

YOUR HOME AND/OR AUTO POLICIES

Recent life changes can open up your eligibility for discounts or leave you inadequately covered. We can help you keep your insurance coverage up-to-date by conducting an Insurance Review. Thank you for your time!

Name: _____

Address: _____

Phone number: _____ Preferred email address: _____

Preferred method of contact: Phone Email Mail Other: _____

Policies currently with agency (select all that apply):

- Auto* Renters/Condo Wedding Commercial policy
- Home Dwelling/Fire PAF Other _____
- Boat Flood Umbrella

*Please verify the number of vehicles on the Auto policies _____

Please circle YES or NO.

YES NO 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 as well as more convenience?

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

- I will be graduating My child will begin driving I will be making a major purchase
- I will be getting married I will be changing jobs I will be buying property
- I will be buying a home I will be starting a business I will be selling property
- I will be having a child I will be selling a business I will be getting a pet
- My child will be graduating I will be retiring

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

Your auto policy

Please circle YES or NO.

- YES NO** Do any of your vehicles have an anti-theft device?
- YES NO** Has your car loan been recently paid off?
- YES NO** Are you considering buying or leasing a new vehicle?
- YES NO** Do you own a hybrid car?
- YES NO** Are any of the vehicles leased?
- YES NO** Do any of your vehicles have customized parts, paint jobs or wrapping?
- YES NO** Has your daily commute changed? By how much? _____
- YES NO** Do you have children at or nearing driving age?
- YES NO** Has your health insurance plan changed recently?
- YES NO** Does your auto policy list all drivers in the household?
- YES NO** Do you have any other policies that are not currently insured with us?
- YES NO** Do you have young drivers on your policy who have an A/B average?
- YES NO** Do you have young drivers on your policy who have completed a driver-training course?
- YES NO** Have you been free of accidents, violations and/or claims in the recent past?
- YES NO** Would you be interested in learning more about additional liability coverage? (ie: Uninsured/Underinsured Motorists or Umbrella coverage)

How would you rate the service that our agency provides?

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

Your home policy

Please circle 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/earthquake/sinkhole insurance?
- YES NO** Do you own valuable jewelry, guns, 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 be interested in learning about 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** Would you be interested in increasing your deductible(s)?

YES NO Do you know anyone who could benefit from our services? If so, please provide their contact information below:

Notes: