

Homeowner's Quote Sheet

Referred By:	
Agent:	CSR:

*Ins'd Name(s): _____ *Phone#: _____

*Email: _____ Other Contact Info: _____

*Current Address: _____

*His: DOB _____ SS _____ *Hers: DOB _____ SS _____

Occupations? _____

*New Purchase? _____ *Approx. Closing Date _____ *Loan Amt. _____ Were you provided w/ a budget or price range? _____

If New Purchase - Mortgage Company? _____ Who are you working with? _____

Married: _____ Kids Under 18: _____

*Any of the following apply? POOL? _____ W/ Slide or Diving Board? _____ Completely fenced w/self latching lock? _____

TRAMPOLINE BURGULAR BARS DOGS? Type?Bite History? BUSINESS ON PREMISES FILED FOR BANKRUPTCY

Notes: _____

Flood Zone _____ WPI-8 _____

Dwelling

PC? _____

*Property Address: _____ City Limits? _____

Yr Blt: _____ *Foundation: _____ Ext: _____ Rf Type: _____ GBLE/HIP/FLT _____ *YR? _____ Stories: _____

Square Footage of Living Area: _____ Garage, Porches, Outbuildings, Carports(sq ftg.) _____

Attached or Detached: _____

Air / Heat: _____ Fireplace? _____ type _____

Kitchen features: _____

(ex: garbage Granite, Solid Wood Cabinets, Stainless Steel, ... Basic,Builder Grade, Semi Custom, Custom.)

No. of Baths: Full _____ Half _____ Features: _____

EX: Granite, Jacuzzi Tub (Basic, Builder Grade, Semi Custom..)

Flooring Type (%): _____

When listing % put details about flooring like carpet 25% , tile 50% , wood 25% laminate.

Plumbing/Wiring/AC ANY known updates?(year) _____ Federal Pacific / Stablock Breaker Panel _____

Burglar or Fire Alarm? _____ Centrally Monitored? _____ Can provide statement or proof? _____

Currently Ins'd with what company? _____ Includes/Excludes Windstorm? _____

Or Other Quotes? _____

Effective dates: _____ Type of Policy _____ Coverage Amount _____

Current Premium: _____

Homeowners Claims Past 5 Years(Please include dates, Type of Loss & approx. amt. of claim)

Your auto or other insurance coverages are currently with? _____

Life/Health Insurance? _____ Individual/Group? _____ Interested? _____

** We require that as many of these questions be answered as possible in order for us to provide you with the most accurate quote and sufficient coverage for your investment. If you are unable to complete a question or need help, just put a "?" and we will discuss it with you.