

Insurance Check Up



CIS
INSURANCE AGENCY
Auto • Home • Business

We understand that life is often unpredictable. That's why we offer insurance that keeps you one step ahead. With your help we can make sure you're ready for whatever life brings your way. So whether it's a fallen tree, a fender-bender or a baseball through the window, you can rest assured knowing you're completely covered. Please take a moment to complete the questions below; this will help us determine if you have made any recent changes that have left gaps in your coverage or made you eligible for any additional discounts. With CIS Agency, we'll make sure you're receiving not just insurance, but peace of mind as well.



Personal Information

Name: _____ Occupation _____ Birthdate: _____

Spouse Name: _____ Occupation _____ Birthdate: _____

Home address: _____

Cell Phone: _____ Home Phone: _____

Email Address: _____

Group Discounts (Check all that apply)

- | | |
|--|---|
| <input type="checkbox"/> Credit Union Member: _____ | <input type="checkbox"/> AARP (Membership #): _____ |
| <input type="checkbox"/> Good Student (3.0 GPA+) _____ | <input type="checkbox"/> Education Association |
| <input type="checkbox"/> Sam's Club Member | <input type="checkbox"/> College Alumni: _____ |

How can we help you today?

- | | |
|--|--|
| <input type="checkbox"/> I want to make sure I'm completely covered. | <input type="checkbox"/> I'm reexamining my needs. |
| <input type="checkbox"/> I want to be sure I'm getting the best value. | <input type="checkbox"/> Other: _____ |
| <input type="checkbox"/> I'm unhappy with my current carrier | _____ |

Questions continued on reverse.



Auto Check Up

How many vehicles are in your home? _____ How many drivers are in your home? _____

Do you have health insurance? No Yes, What Carrier? _____

Is this provided by an Employer? No Yes, Employer? _____



Home Check Up

Do you own or rent your home? Own Rent Current Square Footage: _____

Have you recently done (or plan on doing) any remodeling or additions? No Yes

What? _____

Does your home have a swimming pool? No Yes (Check all that apply)

Above Ground Below Ground Diving Board Slide Fenced Yard

Would you like us to check savings on having a higher deductible? No Yes

Do you have any valuable guns, jewelry or art that you would like to schedule on your policy? No Yes

Description /Amount: _____

Home Security (Check all that apply)

- Burglar Alarm
- Fire Alarm
- Fire Extinguishers
- Smoke Alarm
- Deadbolts on all doors
- Central Station Alarms (Please submit your certificate for discount)



Additional Coverage Check Up

Do you own any of the following?

- Motorcycle
- Classic Car
- Watercraft
- RV
- Business
- Rental Properties

Are you interested in a Personal Umbrella Policy?

- Yes
- No
- Need more information

Questions? _____
