



Kistler Agency, LLC

### Investor Information

Effective Date:

Quote Needed Date:

Business Name:

Mailing Address:

City:  State:  Zip:  Phone:

Physical Address:

City:  State:  Zip:  Website:

Billing Contact:  Billing Contact Email:

Property Manager:  Email:  Phone:

Executive Contact:  Email:  Phone:

Business Type:      Real Estate Investor      Property Manager      Lender      Note Buyer

### Portfolio Information

Total Portfolio	Residential Occupied	Residential Vacant	Commercial	Other
Total Values				
Highest Individual Property Value				
Average Time in Portfolio				
Number of New Properties (Past 12 Months)				

### Insurance Information

Have you incurred any losses or claims, reported or not, in the last three years?      Yes      No

Please provide a 3-year claims report from your current provider.

Optional Coverage / Endorsements:

Deductible:              \$5,000                      \$10,000                      \$25,000

Premises Liability:              Yes      No      Uninstalled Building Materials:              Yes      No

Loss of Rental Income:              Yes      No      Boiler Mechanical Breakdown:              Yes      No

Residential Contents:              Yes      No      Water/Sewer Back-Up:              Yes      No

Flood Coverage:              Yes      No      Ordinance or Law:              Yes      No

### Underwriting Information

Please provide a list of key personnel including job title, current resume, and real estate experience.

Please complete Property Portfolio Spreadsheet or attach your own spreadsheet of locations.

Insured Values represent what value? Purchase Price	Current Market Value Outstanding Loan Balance	Replacement Cost Other (Describe Below)
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Do you plan on buying blocks or groups of properties	Yes	No
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If yes, Number of Properties:	<div></div>	Total Value: \$	<div></div>
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Are you involved in any lending activity or Rent-To-Own?	Yes	No
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If yes, please describe:	<div></div>
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Do you purchase tax liens?	Yes	No
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If yes, please describe:	<div></div>
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Are properties inspected prior to closing?	Yes	No
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If yes, please describe:	<div></div>
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Do you have a company performing inspections, including photos?	Yes	No
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If yes, please list the company name:	<div></div>
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Do you secure properties after purchase?	Yes	No
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If yes, please describe:	<div></div>
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How often are inspections performed after purchase?

Exterior:	Monthly	Bi-Monthly	Quarterly	Other:	<div></div>
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Interior:	Monthly	Bi-Monthly	Quarterly	Other:	<div></div>
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How do you winterize properties?

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Do you perform renovations?	Yes	No
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If yes, please list the name of the contractor utilized:	<div></div>
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Cosmetic:	Yes	No	Average Cost of Renovation: \$	<div></div>
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Structural:	Yes	No	Average Cost of Renovation: \$	<div></div>
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Are all necessary permits pulled?	Yes	No
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Please describe:	<div></div>
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Does the insured maintain a maintenance schedule for it's property? Yes No

What is the typical response time when emergency repairs are needed?

Do you use a management company? Yes No

If yes, please list the name of the management company:

Do you have any subsidized tenants at any location? Yes No

If yes, what percentage?  %

Any student housing? Yes No

If yes, what percentage?  %

Do you have any seasonal or short-term rentals (less than 1 year)? Yes No

*(Short-term rentals are not eligible for this program)*

Are all rental dwellings and tenants registered with local municipalities? Yes No

Do you require tenants to have their own renters' insurance policy? Yes No

Please describe your tenant selection process:

Credit Check

Criminal History

Prior Rental Skips

Do you have eviction procedures that comply with all applicable laws and ordinances? Yes No

Are dogs allowed? Yes No

If yes, please describe size and breed restrictions:

Are any of the following exposures present at any location? (Check all that apply)

Swimming Pools

Trampolines

Playground Sets

Occupancy Rate:  %

How do you minimize losses for theft?

How do you minimize losses for vandalism?

How do you minimize losses for water damage?

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Number of employees:

Does your company have workers compensation coverage? Yes No

Does your company have general liability coverage or a business owners policy? Yes No

Do you hire unlicensed handymen or contractors? Yes No

Are all subcontractors licensed and insured? Yes No

Are you named as additional insured by all subcontractors before work begins? Yes No

Business Plan: Describe your company's operations and future plans (Use a separate sheet if needed):

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*It is the responsibility of the applicant to read and understand the contents of this application. The applicant declares that all information in this application is true, correct and complete and that no material fact has been suppressed or misstated. The applicant further understands that incorrect or incomplete statements or information could void the coverage afforded under the "Policy" issued from the information contained in this application. The applicant also understands that this application and all information attached thereto becomes a part of their "policy", if issued.*

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Signature of Applicant

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Title

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Signature of Agent/Broker

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Date

*To be completed by Unitas Financial Services*

Submission Checklist	
Target Rate Property & Liability	
Prior Carrier, if Lloyd's who is MGA?	
Complete Listing of Properties?	
Three-year loss history from current and/or past carriers or no loss letter?	