



# The Morrison Agency

FROM START TO FINISH

## PERSONAL LINES INFORMATION INTAKE

### **GENERAL INFORMATION:**

Date  
Effective Date  
Name(s)  
Current Address  
Previous Address (<5 yrs)  
Email  
Phone  
Marital Status  
Occupation(s)  
Applicant DOB(s)

### **AUTO:**

Driver(s) / State / DL#  
Vehicle Year/Make/Model/VIN  
Deductible  
Current Limits  
Lienholder  
Claims (3-5 yrs)

### **UMBRELLA:**

Limit

### **Recreational Vehicles/Boats?**

If so, please list make/model/serial #

### **HOMEOWNERS:**

#### **PROPERTY DETAILS**

Roof Year & Updates?  
Square Footage?  
Scheduled Items?  
Claims (3-5 yrs)  
Effective Date  
Coverage A (if known)  
Deductible  
Attached Garage (of cars)  
Porches/Decks SQFT  
Full Baths / Half Baths  
Type of Heat  
Local/Central Burglar Alarm?  
Pool / Trampoline / Dogs / Fence  
Additional Insured / Mortgagee

### **Secondary Home? (same questions**

**apply as above)**