

## Home Quote Sheet

Insured Name: \_\_\_\_\_ Billing (if different) \_\_\_\_\_ Phone: \_\_\_\_\_  
 Street: \_\_\_\_\_ Street: \_\_\_\_\_ Cell: \_\_\_\_\_  
 City, State, ZIP \_\_\_\_\_ City, State, ZIP \_\_\_\_\_ Email: \_\_\_\_\_

|                  |                  |                         |                              |
|------------------|------------------|-------------------------|------------------------------|
| Homeowner/rental | Homeowner Years: | Rental Insurance? Y / N | Insured name on title? Y / N |
|------------------|------------------|-------------------------|------------------------------|

| # | Name        | M/F | DOB | SSN | Relationship | Occupation |
|---|-------------|-----|-----|-----|--------------|------------|
| 1 | - Insured - |     |     |     | -            |            |
| 2 |             |     |     |     |              |            |

|                       |           |                  |          |
|-----------------------|-----------|------------------|----------|
| Current Insurance Co: | Policy #: | Expiration Date: | Premium: |
|-----------------------|-----------|------------------|----------|

| Current Coverage Limits (Deductible \$ _____) |                    |                   |         |                        |                 |
|---|--------------------|-------------------|---------|------------------------|-----------------|
| Dwelling                                      | Personal Liability | Personal Property | Medical | Additional Living Exp. | Aux. Structures |
|   |                    |                   |         |                        |                 |

|  |   |   |   |  |  |
|--|---|---|---|--|--|
| <b>Home Details</b><br><br>Year Built: _____<br><br># of Families: _____ | <b>Type:</b> Frame<br>Brick<br>Modular<br>Mobile<br><br>Other: _____<br><br>Sq. FT: _____ | <b>Style:</b> Ranch<br>Duplex<br>2-story<br>Split Level<br><br>Other: _____<br><br>Garage: Att / Det # ____ | <b>Exterior:</b> Vinyl Siding<br>Al. Siding<br>Wood Siding<br>Brick<br>Stucco<br><br>Other: _____ | <b>HVAC:</b> Electric<br>Gas<br>Central Air<br><br><b>Fireplace:</b> Wood<br>Gas | <b>Updates:</b><br>Wiring: _____<br>Plumbing: _____<br>Heating: _____<br>Roof: _____ |
| <b>Underwriting Information</b>  | Pool: Y / N<br>Fenced: Y / N<br>Trampoline: Y / N   | Pets: Y / N<br>Breed: _____   | Distance from Hydrant:<br>1-500 / 501-600 / 601-1000 / 1000+                                      | Within city limits: Y / N<br>Miles from Fire Station: _____                      | Basement: Y / N<br>Finished: Y / N<br>Crawlspace / Slab                              |
| <b>Endorsements</b>  | Earthquake: Y / N<br>Flood: Y / N<br>Mine Subsidence: Y / N                               | Jewelry, furs, guns: Y / N<br>Water Backup: Y / N<br>Watercraft: Y / N                                      | <b>Discounts</b>  | Smoke Detectors: Y / N<br>Fire Extinguisher: Y / N                               | Deadbolts: Y / N<br>Fire Alarm: Y / N<br>Burglar Alarm: Y / N                        |

| Claims (last 5 yrs) |      |             |
|---------------------|------|-------------|
| Description         | Date | Loss amount |
|                     |      |             |
|                     |      |             |
|                     |      |             |
|                     |      |             |

**Read to client if on phone—Y/N      If in person, this can be printed from Intranet “Consumer Reports Notice”**

**Notice of Ordering Consumer Reports**—In order to determine your premium and evaluate your eligibility for insurance products, insurance companies obtain reports provided by independent consumer reporting agencies, relating to driving record (for automobile insurance), losses and credit. These reports are used to verify and supplement information that you may provide to us. If you wish, we will provide you with the name and address of the consumer reporting agency from whom we order the report(s) so you can obtain a copy, if desired. Examples of the type of consumer reports we order include the following:

**Motor Vehicle / Driving Record Reports**—A motor vehicle report is obtained from your state Motor Vehicle Department, or from an independent consumer reporting agency that relies on such records. This report reflects the driving record information they have on file for you, or other operators under policy, including accidents and motor vehicle violations.

**Insurance Claim Reports**—Insurance claim reports, such as C.L.U.E (Comprehensive Loss Underwriting Exchange) and others, are provided by independent consumer reporting agencies that collect claims information from many insurance companies.

**Insurance Scores**—Insurance Scores are calculated for us using an analytical scoring model that uses credit report information from credit history files maintained by independent consumer reporting agencies.

The above consumer reports may be ordered in connection with the issuance, update, renewal or reinstatement of your policy and when seeking comparison quotes from the companies we represent.