

New Homeowners Policy Worksheet

Basic Info

Name _____ Address _____

Home Phone _____ Business _____ Cell _____

E-Mail Address _____ Effective Date _____

Other Structures (describe) _____ Claims in last 3 years (describe) _____

Pets (describe) _____ Swimming Pool (describe) _____

Trampoline _____ Business Use or Office in Home (describe) _____

Woodstove _____

If home is over 25 years old, indicate year of last updates to:

Plumbing _____ Heating Type & Updates _____ Roof _____

Type of Heat _____ If oil, where is tank located _____

Electrical - Circuit Breakers? _____ # Amps? _____ Fuses? _____ Safety Fuses? _____ Knob & Tube? _____

Credits (check all that apply)

Non-smoker Credit _____ Smoke Detectors _____ Fire Extinguishers _____ Deadbolts _____

Central Burglar Alarm _____ Central Fire Alarm _____ Account Credit _____

Mature Homeowner Credit (age 55+) _____

Optional Coverages (indicate whether coverages should be included, not included, and any comments)

Valuable Items (Jewelry, Silver, etc.) _____

Earthquake _____

Water or Sump Pump Back-up (may require generator) _____

Oil Tank Leakage (requires sleeve or valve) _____

Umbrella Liability Coverage (must be approved by the company) _____

Flood Coverage (separate policy) _____

Other _____

An Insurance Score must be run to finalize our quote. We will need your Date of Birth and Social Security Number. For Data Security purposes please call our office with this information.

Completed By _____ Date _____