

New Condo Unit Worksheet

Basic Info

Name _____ Address _____
Home Phone _____ Business Phone _____
Cell Phone _____ E-Mail Address _____
Effective Date _____ Year of Construction _____ # of Units in Building _____
Frame/Masonry _____ # Firewalls _____ Owner Occupied _____
Claims in last 3 years (describe) _____
Pets (describe) _____ Business Use (describe) _____
Storage area other than in unit _____
Dwelling Amount (by-laws needed) _____ Square footage of Unit _____
Who writes the Master policy? _____ Contents Amount _____
Mortgagee _____

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