



Insurance Check Up



We understand that life is often unpredictable. That's why we offer insurance that keeps you one step ahead. It's our job to anticipate potential risks and make sure you're ready for whatever life brings your way. So whether it's a fallen tree, a fender-bender or a baseball through the window, you can rest assured knowing you're completely covered. Please take a moment to complete the questions below, and we'll make sure you're receiving not just insurance, but peace of mind as well.



Personal Information

Name: _____

Home Address: _____

Phone: _____

Email: _____

Birthdate (mm/dd/yyyy): _____

Current Insurance

(check all that apply):

Auto Carrier: _____

Home Carrier: _____

Condo Carrier: _____

Renters Carrier: _____

Watercraft Carrier: _____

RV Carrier: _____

Motorcycle Carrier: _____

Personal Umbrella Carrier: _____

Business Carrier: _____

What can we help you with today?

I want to make sure I'm completely covered.

I want to be sure I'm getting the best value.

I'm reexamining my needs.

I'm unhappy with my current carrier.

Other: _____



Auto Check Up

Number of vehicles in your home: _____

Number of drivers in your home: _____

Drivers' ages: _____

Your current liability limit is: _____ per person/
_____ per occurrence.

Do you have any violations/claims in the last five years?

Yes No

Vehicle #1

Make: _____

Model: _____

Year: _____

Vehicle #2

Make: _____

Model: _____

Year: _____

Vehicle #3

Make: _____

Model: _____

Year: _____



Home Check Up

Do you own or rent your home?

Own Rent

Address for home to be insured (if different
from previous page):

Have you filed any homeowners or renters claims
in the last five years?

Yes No

Does your current insurance cover your home's
full replacement cost?

Yes No Unsure



Additional Coverage Check Up

Are you interested in a Personal Umbrella Policy?

Yes No Need more information

Do you own any of the following? (Please check all that apply)

Motorcycle Classic car Watercraft
 RV Business Rental properties

Questions? Please let us know if you'd
like any additional information:

