

## HOUSEHOLD FACT FINDER

Date: \_\_\_\_\_

Name \_\_\_\_\_ Marital Status \_\_\_\_\_

Address \_\_\_\_\_ City/State/Zip \_\_\_\_\_

Years at current address \_\_\_\_\_ if less than 3, prior address \_\_\_\_\_

Purchase Date \_\_\_\_\_ Purchase Price \_\_\_\_\_ Original Owner Y/N \_\_\_\_\_

**In order to get an accurate quote, would it be okay if I ran your consumer reports (including your insurance score, loss history and driving record)? Y/N: \_\_\_\_\_**

Primary Insured Social Security # \_\_\_\_\_ DL# \_\_\_\_\_ DOB \_\_\_\_\_

Spouse Name \_\_\_\_\_ Social Security # \_\_\_\_\_

DOB \_\_\_\_\_ DL# \_\_\_\_\_

Total Number of Household Occupants including Children \_\_\_\_\_

Home Phone \_\_\_\_\_ Cell Phone \_\_\_\_\_

Work Phone \_\_\_\_\_ Email \_\_\_\_\_

Preferred method of contact \_\_\_\_\_ Highest level of Education \_\_\_\_\_

# of Dogs \_\_\_\_\_ Breeds \_\_\_\_\_

### **AUTO DETAILS:**

Current Carrier \_\_\_\_\_ Policy Effective Date: \_\_\_\_\_

How Long \_\_\_\_\_ Exp. Date \_\_\_\_\_ Current BI Limits \_\_\_\_\_

Additional Operators: Name: \_\_\_\_\_ DOB \_\_\_\_\_ DL# \_\_\_\_\_

Name: \_\_\_\_\_ DOB \_\_\_\_\_ DL# \_\_\_\_\_

How Many Household Incidents (Accidents/Tickets, Suspensions) in the past 5 years: \_\_\_\_\_

Describe: \_\_\_\_\_

#Vehicles in Household \_\_\_\_\_ Current Coverages: \_\_\_\_\_

Current Comprehensive/Collision Deductibles \_\_\_\_\_ / \_\_\_\_\_ Current Premium: \_\_\_\_\_

Year/ Make/ Model/ Vin # if available: \_\_\_\_\_ Original Owner Y/N Purchased Date: \_\_\_\_\_

Auto 1. \_\_\_\_\_

Auto 2. \_\_\_\_\_

Auto 3. \_\_\_\_\_

Auto 4. \_\_\_\_\_

**HOUSEHOLD DETAILS:** Current Homeowners Ins. Co.? \_\_\_\_\_ How Long? \_\_\_\_\_

Current Premium: \_\_\_\_\_ Policy Effective Date: \_\_\_\_\_ Year Built: \_\_\_\_\_

Primary / Secondary Home: \_\_\_\_\_ Single Family / 2/3/4 Family / Townhouse: \_\_\_\_\_

**Interior:** Sq ft: \_\_\_\_\_ # of stories/Style: \_\_\_\_\_

Foundation: Crawlspace % \_\_\_\_\_ Slab % \_\_\_\_\_ Basement % \_\_\_\_\_ Finished Basement % \_\_\_\_\_

Bathrooms: Full \_\_\_\_\_ Half: \_\_\_\_\_  $\frac{3}{4}$  \_\_\_\_\_ Fireplace \_\_\_\_\_ Wood Stove \_\_\_\_\_

Quality of kitchens and bathrooms: (Basic, Builder's Grade, Semi-custom, custom, designer) \_\_\_\_\_

Garage size: \_\_\_\_\_ Attached / Detached / Built In / Basement / Other: \_\_\_\_\_

Type of Heating System/Central \_\_\_\_\_

Special Features: Bay Windows/Sky lights/Sliding Glass Doors/Solar Windows/Stained glass/Atrium/? \_\_\_\_\_

**Exterior:**

Exterior Wall Type: Wood Siding, Brick Veneer, Stucco, Clapboard, Vinyl, Other \_\_\_\_\_

Year roof installed: \_\_\_\_\_ Composition/Wood/Tile/Metal/Other: \_\_\_\_\_

Roof geometry: Hip  \_\_\_\_\_ Gable  \_\_\_\_\_ Flat  \_\_\_\_\_ Other: \_\_\_\_\_

Other Structures: Sizes: #1 \_\_\_\_\_ #2 \_\_\_\_\_ Hot Tub Y / N

Other outside structures? Cabanas, gazebos, barn, outdoor kitchen, fireplaces, pool: \_\_\_\_\_

Outside attached: *Decking:* Wood/Redwood/Composite \_\_\_\_\_ size: \_\_\_\_\_ *Solar rooms:* \_\_\_\_\_ size: \_\_\_\_\_

*Porches:* \_\_\_\_\_ size: \_\_\_\_\_ (Small 8'X12" Medium 12'X12' Large 12'X20') # of feet to fire hydrant \_\_\_\_\_

Claims on Home in last 5 years? When: \_\_\_\_\_ Type: \_\_\_\_\_

When: \_\_\_\_\_ Type: \_\_\_\_\_

**Additional Details:** Deadbolts / Smoke Detectors / Fire Extinguisher \_\_\_\_\_

Alarm System Y/N Do you pay to have it call the police/fire dept.? Y/N \_\_\_\_\_

How Many Mortgages 0 1 2 3 \_\_\_\_\_ Escrow Account?: \_\_\_\_\_

Life insurance to cover home? \_\_\_\_\_

**Additional Coverage Options:** Base / Enhanced (Claim Rate Guard and Claim Free Bonus)

Deductible \_\_\_\_\_

Add'l Living Expenses \_\_\_\_\_ Personal Property Coverage \_\_\_\_\_

Building Materials Theft \_\_\_\_\_ Cameras \_\_\_\_\_ Electronic Data Recovery \_\_\_\_\_ Extended Coverage for Jewelry/Watches/Furs \_\_\_\_\_

Identity Theft \_\_\_\_\_ Loss Assessment \_\_\_\_\_ Musical Instruments \_\_\_\_\_

Sports Equipment \_\_\_\_\_ Water Backup \_\_\_\_\_ Yard and Garden \_\_\_\_\_

**For additional multi-policy discounts can I ask if you own a .....**

**RECOMMEND**

Auto: _____	Motorcycle: _____	Life insurance: _____	LifeLock _____
Personal Umbrella _____	Motor Home: _____	Condominium: _____	Flood: _____
Renters: _____	Landlords: _____	Business Insurance: _____	
Second Home: _____	Off-Road Vehicles: _____	Commercial Auto: _____	Commercial Property: _____