

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: _____ ¾ _____ 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

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