

# AUTO INSURANCE QUOTE QUESTIONAIRE

Date \_\_\_\_\_ Time \_\_\_\_\_

**DRIVER INFORMATION:**

Name (Married Yes No)	Birthdate	Social Sec #	Driver's License #	Relationship to Insured	Good Student
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

(Do any drivers have violations? If so, what? \_\_\_\_\_)

Address: \_\_\_\_\_ Phone# \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_ Cell# \_\_\_\_\_

**AUTO INFORMATION:**

Year, Make and Model _____	Comprehensive ___	Collision ___
Liability Only ___	100 250 500	250 500 1000
Year, Make and Model _____	Comprehensive ___	Collision ___
Liability Only ___	100 250 500	250 500 1000
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**COVERAGE INFORMATION:**

Liability \_\_\_ 25/50 \_\_\_ 50/100 \_\_\_ 100/300 \_\_\_ 250/500 \_\_\_ 100,000 \_\_\_ 300,000 \_\_\_ \$500,000

UM/BI \_\_\_ same as Liability Coverage

Medical \_\_\_ \$1,000 \_\_\_ \$5000 \_\_\_ other

Towing and Labor \_\_\_ \$25 \_\_\_ \$50 \_\_\_ \$75

Car Rental \_\_\_ \$30 \_\_\_ \$40 \_\_\_ \$60

\*\*\*Electronic/CD if auto has expensive sound system

**NOTES:**

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Date and Time called back with quote \_\_\_\_\_

# HOMEOWNERS QUOTE QUESTIONNAIRE

Date \_\_\_\_\_ Time \_\_\_\_\_

Name: \_\_\_\_\_ Birthdate \_\_\_\_\_ Social Sec \_\_\_\_\_  
(used for insurance credit score)

Address \_\_\_\_\_  
\_\_\_\_\_

Phone: \_\_\_\_\_ Cell \_\_\_\_\_

Year home was built \_\_\_\_\_ (if older, has plumbing and electric been updated to breakers?)

Is home \_\_\_ Brick \_\_\_ frame \_\_\_ modular? 1 or 2 story? \_\_\_ Square Footage \_\_\_\_\_

Is home built on a \_\_\_ slab \_\_\_ crawlspace \_\_\_ basement

Is basement finished \_\_\_\_\_? If yes, coverage for water backup \_\_\_\$10,000 \_\_\_\$25,000 \_\_\_\$40,000

## Do you have?

\_\_\_ Woodburner      \_\_\_ Security System      \_\_\_ Boat  
\_\_\_ Trampoline      \_\_\_ Home Business      \_\_\_ Swimming Pool  
\_\_\_ Pets, if yes what breed \_\_\_\_\_  
\_\_\_ Any Farming  
\_\_\_ Outbuildings? If yes, size and value \_\_\_\_\_  
\_\_\_ Any jewelry or firearms of value? If yes, values \_\_\_\_\_

Who is your home insured with now? \_\_\_\_\_

What is your deductible? \_\_\_\_\_ (We usually quote \$1000)

Do you have any claims in the last 3 years? \_\_\_\_\_

If so, Describe \_\_\_\_\_  
\_\_\_\_\_

What amount of coverage do you currently have on it \_\_\_\_\_

We will do a cost evaluator using the above information to determine a value to insure your home. If there is anything else we should know about your home, please let us know.

Notes:

Date and time called back with quote: \_\_\_\_\_