



## Insurance review checklist – your home policy

### HOME

Recent life changes can open up your eligibility for discounts or leave you inadequately covered. We can help you keep your home insurance up-to-date by conducting an insurance review.

**Please indicate any upcoming changes\* you expect in the next year.**

I will be graduating

My child will be graduating

My child will begin driving

I will be buying property

I will be making a major purchase

I will be getting married

I will be selling property

I will be buying a home

I will be changing jobs

I will be selling a business

I will be having a child

I will be starting a business

I will be getting a pet

I will be retiring

\*If any of these changes have occurred in the past year, please indicate as well.

**Please select YES or NO.**

- |            |           |  |
|------------|-----------|--|
| <b>YES</b> | <b>NO</b> | Do you know if your current policy would cover the cost to rebuild your home in the event your home suffered an entire loss? |
| <b>YES</b> | <b>NO</b> | Have you recently remodeled or made changes to the structure of your home?   |
| <b>YES</b> | <b>NO</b> | Do you have a swimming pool or large structure not attached to your home?  |
| <b>YES</b> | <b>NO</b> | Do you have a wood burning stove?  |
| <b>YES</b> | <b>NO</b> | If you rent or own a condo, do you have renters or condo insurance?  |
| <b>YES</b> | <b>NO</b> | Do you own valuable jewelry, furs, antiques, collectibles or sporting equipment?   |
| <b>YES</b> | <b>NO</b> | Have you recently installed a smoke detector, fire extinguisher, burglar or fire alarm?                                      |
| <b>YES</b> | <b>NO</b> | Do you have a home office or run a business out of your home? If so, what type of business?                                  |
| <b>YES</b> | <b>NO</b> | Do you have seasonal/rental properties that are not insured through this agency?   |
| <b>YES</b> | <b>NO</b> | Would you like a no-obligation quote for Identity Fraud coverage?  |
| <b>YES</b> | <b>NO</b> | Do you own a boat or yacht?  |
| <b>YES</b> | <b>NO</b> | Would you be interested in learning more about additional liability coverage?  |

**By completing the questions below, we can help you assess your needs.**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Email address: \_\_\_\_\_

Preferred method of contact:    Phone    Email    Mail    Other: \_\_\_\_\_

Policies currently with agency (select all that apply):

- |               |                           |
|---------------|---------------------------|
| Auto          | Wedding                   |
| Home          | Personal Articles Floater |
| Renters       | Umbrella                  |
| Condo         | Other                     |
| Dwelling/Fire |                           |
| Flood         |                           |



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