

Date \_\_\_\_\_

# Auto Proposal Information Sheet

(Attach printed out PQB, MVR etc.. along with any notes of changes to PQB info.)

Producer \_\_\_\_\_

Nm 1 \_\_\_\_\_ BD \_\_\_\_\_ DL# \_\_\_\_\_ ST \_\_\_\_\_ SS# \_\_\_\_\_

Nm 2 \_\_\_\_\_ BD \_\_\_\_\_ DL# \_\_\_\_\_ ST \_\_\_\_\_ SS# \_\_\_\_\_

Nm 3 \_\_\_\_\_ BD \_\_\_\_\_ DL# \_\_\_\_\_ ST \_\_\_\_\_ SS# \_\_\_\_\_

Nm 4 \_\_\_\_\_ BD \_\_\_\_\_ DL# \_\_\_\_\_ ST \_\_\_\_\_ SS# \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ Zip \_\_\_\_\_  
(If less than 3 yrs)

Own Home Y / N How long have you lived there? \_\_\_\_\_ Previous Address \_\_\_\_\_

HM Phone \_\_\_\_\_ Work / Other Phone \_\_\_\_\_ Cell Phone \_\_\_\_\_

Who is your current insurance with? \_\_\_\_\_ How long have you been with them? \_\_\_\_\_

Are you Married or Single Do you have any children in household? Y / N Are they licensed? Y / N

Are there any other licensed drivers in the household? Y / N If any lic. Children do they have a "B" avg? Y / N

Number of miles driven in a day \_\_\_\_\_ year \_\_\_\_\_ Any Accidents or Tickets \_\_\_\_\_

|   | <u>Year</u> | <u>Make</u> | <u>Model</u> | <u>Vin# or features</u> | <u>Odometer Reading</u> | <u>Original Owner</u> | <u>Date Purchased</u> |
|---|-------------|-------------|--------------|-------------------------|-------------------------|-----------------------|-----------------------|
| 1 | _____       | _____       | _____        | _____                   | _____                   | _____                 | _____                 |
| 2 | _____       | _____       | _____        | _____                   | _____                   | _____                 | _____                 |
| 3 | _____       | _____       | _____        | _____                   | _____                   | _____                 | _____                 |
| 4 | _____       | _____       | _____        | _____                   | _____                   | _____                 | _____                 |

What coverage's do you currently have on your vehicles?

|               | <u>Car1</u> | <u>Car2</u> | <u>Car3</u> | <u>Car4</u> |
|---------------|-------------|-------------|-------------|-------------|
| Bodily Injury | _____/_____ | same        | same        | same        |
| Prop Damage   | _____       | same        | same        | same        |
| UM Liab       | _____/_____ | same        | same        | same        |
| UM PD         | _____       | same        | same        | same        |
| Medical       | _____       | same        | same        | same        |
| Comp (Ded)    | _____       | _____       | _____       | _____       |
| Coll (Ded)    | _____       | _____       | _____       | _____       |
| Rental        | _____       | _____       | _____       | _____       |

**We can save you additional money by insuring your property, would you like a proposal? Y / N**

"In order to provide you an accurate quote with the best rate available I need to order a few consumer reports, verify your driving record, prior losses, and insurance score. What is your driver's license number? And your social security number? " (Get this on all licensed operators in HH to be listed on policy)"We will prepare your proposal and get back with you within 30 minutes."