

Date _____

Property Proposal Information Sheet

Producer _____

(Attach printed out PQB reports, quote and any notes to changes made to PQB information)

Name 1 _____ DOB _____ SS# _____

Name 2 _____ DOB _____ SS# _____

Address _____ City _____ Zip _____

How long at current address: _____ Is this address same as the address we are insuring? Y / N
(If less than 3 years Previous address _____)

HM Phone _____ Work / Other Phone _____ Cell _____

Are you Married or Single Does anyone else live with you? Y/N Is anyone over 55, Retired? Y / N

Homeowners, Fire, Landlords

(For Fire or LPP play close attention to MMG requirements)

What is the total square footage of the home we are going to insure? _____

Number of Stories? 1 1 1/2 2 2 1/2 3 Basement? Y / N % Finished _____

Central Heating & Air? Y / N Fireplace? Y / N 1 2 3 Deck or Patio? Y / N How Large? _____

How many Baths? 1 2 3 4 How many half baths? 1 2 3 Inground Pool? Y / N Satellite Dish?(If yes, must add cov.) Y / N

Do you have a Garage or Carport? 1 2 3 4 Attached Built-In(living space above) Detached

Is the home mostly Brick or Siding or Other What year was the home built? _____ New Purchase Now? Y / N

Is the roof regular shingle? Y / N If no, what _____ Current Market value? _____

Do not quote w/ discount! Must have proof first. Only make cust. aware that there could be addl. discount.

If the home is over 15 years old has it been renovated? Roof _____ Plumbing _____ Electrical _____ Heat/Cool _____

Does the home have Smoke Detectors Dead Bolt Locks Fire Extinguishers Monitored Alarm System

Who is your current insurance company _____ How long have you been with them _____

Current Premium _____ Which deductible option are you interested in? 500 1,000 2,500 5,000

Have you had any property insurance losses in the past 5 years? Y / N If yes when _____ What type of loss? _____

Do you have any special coverage needs such as scheduled jewelry? Y / N Amount _____

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

Renters or Condo

Approximate value of your contents? (min 22,000 for replacement cost coverage) _____

If Condo how much interior dwelling coverage would you like? _____

Do you have Smoke Detectors Dead Bolt Locks Fire Extinguisher Alarm System Gated or Manned Security Service

We can save you additional money by insuring your autos also, 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 prior losses, and insurance score. What is your social security number? “ (Get this on all insured to be listed on policy or if married on spouse) “We will prepare your proposal and get back with you within 30 minutes.”