

Insurance review checklist – your auto policy

AUTO

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

Thank you for your time!



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):

- | | |
|--|--|
| <input type="checkbox"/> Auto | <input type="checkbox"/> Wedding |
| <input type="checkbox"/> Home | <input type="checkbox"/> Personal Articles Floater |
| <input type="checkbox"/> Renters/Condo | <input type="checkbox"/> Umbrella |
| <input type="checkbox"/> Dwelling/Fire | <input type="checkbox"/> Other |
| <input type="checkbox"/> Flood | |

Are you currently set up with an automatic payment plan? YES NO

– If not, would you be interested in learning more about different payment options that may offer a discount on your premium? YES NO

How would you rate the service that our agency provides? _____

What can we improve or provide to make your experience with us even better? _____

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

- | | | |
|--|---|--|
| <input type="checkbox"/> I will be graduating | <input type="checkbox"/> I will be getting married | <input type="checkbox"/> I will be having a child |
| <input type="checkbox"/> My child will be graduating | <input type="checkbox"/> I will be selling property | <input type="checkbox"/> I will be starting a business |
| <input type="checkbox"/> My child will begin driving | <input type="checkbox"/> I will be buying a home | <input type="checkbox"/> I will be getting a pet |
| <input type="checkbox"/> I will be buying property | <input type="checkbox"/> I will be changing jobs | <input type="checkbox"/> I will be retiring |
| <input type="checkbox"/> I will be making a major purchase | <input type="checkbox"/> I will be selling a business | |

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

Please select YES or NO.

YES **NO** Do any of your vehicle(s) have an anti-theft device?

YES **NO** Has your daily commute changed?
By how much?_____

YES **NO** Do you have children at or nearing driving age?

YES **NO** Has your car loan been recently paid off?

YES **NO** Are you considering buying or leasing a new vehicle?

YES **NO** Do you own a hybrid car?

YES **NO** Do you have any customization of vehicles including, but not limited to, personal car wraps?

YES **NO** Has your health insurance plan changed recently?

YES **NO** Does your auto policy list all drivers?

YES **NO** Do you have any other policies that are not currently insured with us?

YES **NO** Do you have young drivers on your policy who have a strong A/B average?

YES **NO** Do you have young drivers on your policy who have completed a driver-training course?

YES **NO** Have you been free of accidents, violations and/or claims in the recent past?

YES **NO** Do you know anyone else who could benefit from a no-obligation insurance review from our agency?
If so, please provide their contact information below:
