



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.

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

