

# H03 WORKSHEET

## BASIC INFO

Date \_\_\_\_\_ Initials \_\_\_\_\_ Referral Source \_\_\_\_\_  
Name \_\_\_\_\_ Address \_\_\_\_\_  
E-Mail Address \_\_\_\_\_  
Home Phone # \_\_\_\_\_ Business Phone # \_\_\_\_\_ Fax # \_\_\_\_\_  
Effective Date \_\_\_\_\_ New Purchase \_\_\_\_\_ Purchase Price \_\_\_\_\_  
Owner Occupied \_\_\_\_\_ Primary \_\_\_\_\_ Occupants \_\_\_\_\_  
Dwelling Amount \_\_\_\_\_ Sq. Ft. Living Space \_\_\_\_\_ # of Families \_\_\_\_\_  
Liability Amount \_\_\_\_\_ Med. Pay Amount \_\_\_\_\_ Ded. Amount \_\_\_\_\_  
Year Built \_\_\_\_\_ Style \_\_\_\_\_ Frame/Masonry \_\_\_\_\_  
Updates: Heat (Yr. Updated) \_\_\_\_\_ If oil, location of tank \_\_\_\_\_  
Wiring (Yr. Updated) \_\_\_\_\_ AMP \_\_\_\_\_ Knob & Tube? \_\_\_\_\_  
Plumbing (Yr. Updated) \_\_\_\_\_  
Roof (Yr. Updated) \_\_\_\_\_

## UNDERWRITING INFO

SS# \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ DOB \_\_\_\_\_ Occupation \_\_\_\_\_  
SS# \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ DOB \_\_\_\_\_ Occupation \_\_\_\_\_  
Prior Coverage \_\_\_\_\_ Canc/Denied/Non-Ren. \_\_\_\_\_ Eff. Date \_\_\_\_\_  
Loss History \_\_\_\_\_ Credit Check \_\_\_\_\_ Woodstove \_\_\_\_\_  
Swimming Pool \_\_\_\_\_ Fenced \_\_\_\_\_ Slide/Div. Board \_\_\_\_\_  
Trampoline \_\_\_\_\_ Pets \_\_\_\_\_ Biting History \_\_\_\_\_  
Under Const. \_\_\_\_\_ Business Use \_\_\_\_\_ Coastal \_\_\_\_\_  
Other Struct. \_\_\_\_\_

## CREDITS

Acct. Credit \_\_\_\_\_ Loss Free Cr \_\_\_\_\_ Non-Smoker \_\_\_\_\_ Mature Homeowners \_\_\_\_\_  
Fire Est. \_\_\_\_\_ Smoke Det. \_\_\_\_\_ Dead Bolts \_\_\_\_\_ Carbon Mon. \_\_\_\_\_  
Other Alarms \_\_\_\_\_

## OPTIONAL COVERAGES

(Yes/No/Quote)

Additional Cov. Endsmt \_\_\_\_\_ Business Use \_\_\_\_\_ Computer \_\_\_\_\_  
Earthquake \_\_\_\_\_ Employees \_\_\_\_\_ Flood \_\_\_\_\_  
Fungi \_\_\_\_\_ Identity Theft \_\_\_\_\_ Incr. Other Struct. \_\_\_\_\_  
Ordinance or Law \_\_\_\_\_ Other Prop. Owned \_\_\_\_\_ Recreation Vehicles \_\_\_\_\_  
Sched. Fine Arts \_\_\_\_\_ Sched. Furs \_\_\_\_\_ Sched. Jewelry \_\_\_\_\_  
Sched. Silver \_\_\_\_\_ SPP \_\_\_\_\_ Umbrella \_\_\_\_\_  
Watercraft \_\_\_\_\_ Water Back-Up \_\_\_\_\_ Sinkhole \_\_\_\_\_

## MORTGAGE INFO

Mortgage Address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Remarks: \_\_\_\_\_