

New Homeowners Policy Worksheet

Basic Info

Name _____ Address _____

Home Phone _____ Business _____ Cell _____ E-Mail _____

Effective Date _____ Year of Construction _____ # of Families _____

Other Structures (describe) _____ Claims in last 3 years (describe) _____

Pets (describe) _____ Swimming Pool (describe) _____

Trampoline _____ Woodstove _____ Business Use (describe) _____

If over 25 years, indicate last updates to:

Plumbing _____ Heating _____ Electrical _____ Roof _____

Credits (check all that apply)

Non-smoker Credit _____ Smoke Detectors _____ Fire Extinguishers _____ Deadbolts _____

Central Burglar Alarm _____ Central Fire Alarm _____ Account Credit _____

Mature Homeowner Credit (age 55+) _____

Optional Coverages (indicate all coverages to be included)

Replacement Cost on Contents Yes/ No Water or Sump Pump Back-up Yes/No

Valuable Items (Jewelry, Silver, etc) Yes/No Business in the Home Yes/No

Home PC/Laptop Expanded Coverage Yes/No Identity Theft Yes/No

Earthquake Yes/No Building Code Coverage Yes/No

Watercraft Yes/No Recreational Vehicles Yes/No

Mold Coverage (Limited Increases Available) Yes/No Flood Coverage Yes/No

Personal Injury (includes Libel, Slander, and Wrongful Eviction and Defamation of Character) Yes/No Oil Tank Leakage Yes/No

Umbrella Liability Coverage (must be approved by the company) Yes/No

Completed By _____ **Date** _____