

# NEW AUTO POLICY WORKSHEET

## BASIC INFO

Name \_\_\_\_\_ Address \_\_\_\_\_

Effective Date \_\_\_\_\_ Home phone # \_\_\_\_\_ Business phone # \_\_\_\_\_

Cell phone # \_\_\_\_\_ E-mail address \_\_\_\_\_

Current vehicles \_\_\_\_\_

Current drivers' \_\_\_\_\_

Current odometer reading(s) \_\_\_\_\_ Used in Business? \_\_\_\_\_

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## CREDITS AVAILABLE (check all that apply)

Account Credit \_\_\_\_\_ # Years at Current Residence \_\_\_\_\_ Pay in Full Discount \_\_\_\_\_

Good Student Credit \_\_\_\_\_ Away at School Credit (must be more than 100 miles and without a car at school) \_\_\_\_\_

Motor Club Member (which one, how long a member) \_\_\_\_\_

SBLI Policyholder \_\_\_\_\_ WBUR Member \_\_\_\_\_ Natick Fed Bank Employee \_\_\_\_\_

Middlesex Savings Employee \_\_\_\_\_ Metrowest Credit Union Member \_\_\_\_\_

Town of Natick Employee \_\_\_\_\_ TCAN Member \_\_\_\_\_

Safe Roads Alliance Member \_\_\_\_\_

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## ENDORSEMENTS AVAILABLE (check all that should be included in the quote)

Loan/Lease Gap \_\_\_\_\_ New Car Replacement \_\_\_\_\_ Accident Forgiveness \_\_\_\_\_

Disappearing Ded \_\_\_\_\_ OEM (original parts) \_\_\_\_\_ Pet Injury \_\_\_\_\_ Custom Equipment \_\_\_\_\_

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## SERVICES AVAILABLE

EFT \_\_\_\_\_ 24/7 Billing Inquiry \_\_\_\_\_ Policy sent by E- Mail \_\_\_\_\_

Completed by \_\_\_\_\_ Date \_\_\_\_\_