

## New Homeowners Policy Worksheet

### Basic Info

Name \_\_\_\_\_ Address \_\_\_\_\_  
Phone Numbers \_\_\_\_\_ Date(s) of Birth \_\_\_\_\_  
E-Mail Address \_\_\_\_\_ Effective Date \_\_\_\_\_  
Other Structures (describe) \_\_\_\_\_ Claims in last 3 years (describe) \_\_\_\_\_  
Pets (describe) \_\_\_\_\_ Swimming Pool (describe) \_\_\_\_\_  
Trampoline \_\_\_\_\_ Business Use or Office in Home (describe) \_\_\_\_\_  
Student Away at School \_\_\_\_\_ Part of Home Assoc \_\_\_\_\_  
Rented F/T or P/T (AirBnB etc) \_\_\_\_\_ Self-Storage Unit \_\_\_\_\_  
Woodstove \_\_\_\_\_

If home is over 25 years old, indicate year of last updates to:

Plumbing \_\_\_\_\_ Heating \_\_\_\_\_ Roof \_\_\_\_\_ Wiring \_\_\_\_\_  
Electrical: Circuit Breakers? \_\_\_\_\_ # Amps? \_\_\_\_\_ Fuses? \_\_\_\_\_ Safety Fuses? \_\_\_\_\_ Knob & Tube? \_\_\_\_\_  
Type of Heat \_\_\_\_\_ If oil, where is tank located \_\_\_\_\_ Protective Sleeve? \_\_\_\_\_

### 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 whether coverages should be included, not included, and any comments)

Valuable Items (Jewelry, Silver, etc.) \_\_\_\_\_  
Water or Sump Pump Back-up (may require generator) \_\_\_\_\_  
Umbrella Liability Coverage (must be approved by the company) \_\_\_\_\_  
Earthquake \_\_\_\_\_  
Flood Coverage (separate policy) \_\_\_\_\_  
Other \_\_\_\_\_

Completed By \_\_\_\_\_ Date \_\_\_\_\_