

Insurance Renewal Checklist

Name:

Address:

Phone Number:

Preferred Email Address:

Preferred Method of Contact: Phone Email Mail Other

Are you currently set up with an automatic payment plan? Yes No

If not, would you want to learn more about different payment options that may offer a discount on your premium as well as more convenience? Yes No

Do you know anyone who could benefit from our services? If so, please provide their contact information. Yes No

Your Auto Policy

Has your car loan been paid off? Yes No

Are you considering buying or leasing a new vehicle? Yes No

Are any of the vehicles leased? Yes No

Has your daily commute changed? By how much? _____ Yes No

Do you have children at/or near driving age? Yes No

Does your auto policy list all drivers in the household? Yes No

Do you have any other policies that are not currently insured with us? Yes No

Do you have young drivers on your policy who have an A/B average? Yes No

Do you have young drivers on your policy who have completed a driver-training course? Yes No

Would you be interested in learning more about additional liability coverage? (Uninsured/underinsured motorists or umbrella coverage) Yes No

Your Home Policy

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

Are you interested in flood/earthquake/sinkhole insurance? Yes No

Do you own valuable jewelry, guns, 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? What kind? _____ Yes No

Do you have seasonal/rental properties that are not insured through us? Yes No

Do you own a boat or a yacht? Yes No

Would you be interested in learning more about additional liability coverage? Yes No

Would you be interested in increasing your deductible? Yes No