

CSR _____

HOMEOWNERS QUESTIONNAIRE

DATABASE _____
QUOTE # _____

Date _____

Source of lead _____

Name _____ Mailing Address: _____

City _____ State _____ Zip _____ Email _____

Phone(H)() - Phone(B)() - Cell#() - Fax# () -

Marital Status _____ DOB _____ SS# _____

Occupation _____ Emp. Name/City _____

Spouse Name _____ DOB _____ SS# _____

POLICY FORM: _____ OPT: _____ DISTANCE TO WATER: _____

Construction: _____ YR BUILT: _____ # FAM: _____ # FL: _____ SQ FT: _____ L _____ W _____

STYLE: _____ GARAGE: _____ BATHS: _____ FIREPLACE: _____ CHIMNEY: _____

BASEMENT: _____ A/C: _____ HEATING: _____

WHERE'S THE TANK? _____ AGE: _____ WOOD BURNING STOVE? _____

UPDATES: ELECTRIC _____ PLUMBING _____ ROOF _____ Heating _____

ANY DOGS? _____ IF YES, BREED _____ DOES IT BITE: _____ SMOKER _____

CLAIMS: _____ IF YES, TYPE: _____ DATE _____ \$ _____

TYPE _____ DATE _____ \$ _____ BEING NON RENEWED? _____

TYPE _____ DATE _____ \$ _____ BEING NON RENEWED? _____

INS CO. _____ X-DATE _____ PREM _____ PAYOR _____

DWEL _____ LIAB _____ DED _____ MKT VALUE _____ LOAN AMT _____

REPL COST ON HOME / CONTENTS _____ UMBRELLA _____ WATERCRAFT _____ SECONDARY RESIDENCE _____

SMOKE DETECTORS _____ SECURITY _____

SCHEDULED JEWELRY _____ FURS _____ OTHER _____

UNSCHEDULED JEWELRY _____ FURS _____ OTHER _____

COMMENTS _____

