

## Homeowner's Quote Sheet

Name/DOB: \_\_\_\_\_  
Phone#: \_\_\_\_\_ E-Mail: \_\_\_\_\_  
Spouse's Name/DOB: \_\_\_\_\_  
Property Address: \_\_\_\_\_  
Own/ Rent/ Other: \_\_\_\_\_ Current Residence for 2+ Years? Y /N  
If NO, Previous Address: \_\_\_\_\_  
New Purchase? Y /N If YES, Closing date: \_\_\_\_\_  
Pay Plan: Escrow Annual Semi-Annual Quarterly Monthly EFT Deductible: \$ \_\_\_\_\_  
Mortgage Comp. Name/Address: \_\_\_\_\_  
Current Insurance Carrier: \_\_\_\_\_ Current Payment: \$ \_\_\_\_\_

### HOME INFORMATION

City Water? Y/N # Of Occupants: \_\_\_\_\_ Year Built: \_\_\_\_\_ Sq. Footage: \_\_\_\_\_  
# Of Stories: \_\_\_\_\_ Foundation: Crawl Space Slab Piers Basement(\_\_\_\_% finished)  
Construction: Frame Brick/Masonry Modular Mobile Home (Make/Model): \_\_\_\_\_  
Exterior: Vinyl Aluminum Brick Wood: \_\_\_\_\_ Other: \_\_\_\_\_  
Garage? Y/N Attached / Detached \_\_\_\_\_-Car(s)  
Porch: \_\_\_\_\_ SQ ft Covered: Y /N Deck: \_\_\_\_\_ SQ ft Covered: Y /N  
Additional Detached Structures? Y /N Description: \_\_\_\_\_ Value: \_\_\_\_\_  
Primary Heat Source: \_\_\_\_\_ Wood Burning Stove? Y /N Location: \_\_\_\_\_  
Fireplace? Y /N Gas /Electric Pool: Y /N Inground /Aboveground Trampoline: Y /N  
Fenced Yard? Y /N Any Business Conducted on the Premises?(Clients in home) Y /N  
Dogs: Y /N Breed: \_\_\_\_\_ Bite History: Y /N Farm Animals? Y /N Type: \_\_\_\_\_  
Update Year: Plumbing \_\_\_\_\_ Heating \_\_\_\_\_ Roof \_\_\_\_\_ (professional install? Y /N ) Electric \_\_\_\_\_  
Any Losses/Claims in past 5 years? Y /N  
If yes, info: \_\_\_\_\_  
\_\_\_\_\_

### DISCOUNTS:

Package: \_\_\_\_\_ Flood Insurance: \_\_\_\_\_ Security System: Y /N Type: \_\_\_\_\_  
Back-up Generator: Y /N  
Occupation/Employer: \_\_\_\_\_