

Homeowners Quoting & Binding Questionnaire-

Today's Date _____

Name:

Property Address:

Applicants DOB:

Phone Number:

Email Address:

Preferred contact: Email or Phone

Mailing Address:

New Purchase? Y / N - Closing date:

Current Coverage? Y/N Expiration Date:

Construction Type: Concrete, Frame, Superior, Other -

Year Built:

Type of Residence: Single Family, Condo, Duplex, Mobile, Other

If built prior to 2002- How old is the roof? ____ Roof Shape- Gable, Hip, Flat

Roof Material- Shingle, Tile, Rolled, Metal or Other

Is there a wind mitigation report?

Built 1987 or Older- Updates? Electrical ____ Plumbing/Water Heater-Location ____ Heating/AC ____

Occupancy: Primary ____ Seasonal ____ Secondary ____ Investment/Rental ____ (Annual Or Seasonal)

Will the home have monitored alarms? Burglar ____ Fire ____ Gated ____

Claims in last 5 years? _____ Dogs? Breed _____

Fire Hydrant within 1000 feet? _____ Pool? Y / N ____ Pool Cage? Y/N _____

Binding Date? _____

Lead → Yellow Pages – Internet - Referral - Friend or Broker - Other

Notes:

Ask about their other insurance needs... Auto, Flood, Commercial, Boat, RV, etc

Mobile Homes

Manufacturer- _____

Length X Width - _____

Serial # _____

Carport- Y / N

Patios? Screened or Vinyl Windows? Size _____

Roof Type- Shingle; Metal; Other _____

Skirting? Y / N- Concrete Block; Vinyl; Other _____

Park or Subdivision Name _____

Additional Info that will help increase Citizens RCE:

Flooring Type- Tile, Laminate, Wood, Carpet, etc.

Upgraded Kitchen or Bathrooms? Cabinets?

Central AC or Window Unit