



Discount Check-Up Form

This Discount Check-Up Form will help us determine if you have made any recent changes that have left gaps in your coverage, or made you eligible for any discounts. On items we already insure, please indicate any changes to value or usage.

Name: _____ Date: _____

Address: _____

City: _____ State: _____ Zip: _____

Preferred Contact Information:

Home Phone: _____ Business Phone: _____

Best time to call: _____ Fax Number: _____

Email Address: _____

For each question, please circle all that apply:

Yes No 1. Do you have collectibles such as antiques, fine art, stamps, coins, or baseball cards?

Describe _____

Yes No 2. Do you own jewelry or furs valued over \$500?

Describe _____

Yes No 3. Do you own costly sporting equipment or firearms?

Describe _____

Yes No 4. Do you have valuable cameras or other photography equipment?

Describe _____

Yes No 5. Do you have any alarms installed in your home?

Describe _____

Yes No 6. Are your personal belongings insured for their full replacement value?

Yes No 7. Do you have children away at college?

Yes No 8. Do you own tools, equipment, or instruments used in your trade or profession?

Describe _____

Yes No 9. Do you have a home based business or work from home?

If so, how often are employees or clients in your home for business purposes? _____

Yes No 10. Do you have a dog, or other pet that may pose a risk to others?

Yes No 11. Have you recently made improvements to your home of \$300 or greater?

Yes No Do you have plans to do so?

- Yes No 12. If your home suffered an entire loss, would your insurance cover your home's full replacement value?
- Yes No 13. Would you like us to quote your homeowner policy (if applicable) with a higher deductible to see how much you can save?
- Yes No 14. Are you interested in flood insurance for your home and personal property?
- Yes No 15. Are you interested in earthquake insurance?
- Yes No 16. Do you use a wood-burning stove?
- Yes No 17. Do you have a swimming pool?
- Yes No 18. Do you own rental, investment or farm property?
- Yes No 19. Do you own a vacation home (i.e., condo, cabin, or trailer)?
- Yes No 20. If you rent, do you carry renters insurance?
- Yes No 21. If you own a condo, do you have condo insurance?
- Yes No 22. Does our agency insure all of your vehicles?
- Yes No 23. Does your automobile policy specify by name all of the drivers in your household?
- Yes No 24. Do you routinely use vehicles you do not own?
- Yes No 25. If your vehicle were damaged in an accident, would your current automobile insurance reimburse you for a rental vehicle while your's is being repaired?
- Yes No 26. Do you own a boat?
If so, please indicate the make of boat: _____ Horsepower: _____
Size of engine: _____ Inboard ____ Outboard ____
- Yes No 27. Do you own a motorcycle?
Make: _____ Model: _____ cc's: _____
- Yes No 28. Do you own any of the following recreational vehicles?
Yes No Camper
Yes No Motor Home
Yes No Golf Cart
Yes No All-Terrain Vehicle
Yes No Snowmobile
Yes No Others _____
- Yes No 29. Do you carry at least a \$1-million umbrella liability policy?
Yes No If not, would you like a no-obligation quote?
- Yes No 30. Do you own a business?
Yes No If so, do we currently insure it?
- Yes No 31. Do you plan to start a business?
- Yes No 32. Do you know anyone else who could benefit from a no-obligation insurance review from our agency? Name: _____
Phone: _____

Thank you! We appreciate your time.