

## Homeowner's Quote Sheet

Name: \_\_\_\_\_  
Phone #: \_\_\_\_\_ E-Mail: \_\_\_\_\_  
DOB: \_\_\_\_\_ Spouse's Name/DOB: \_\_\_\_\_  
Property Address: \_\_\_\_\_  
Own / Rent / Other: \_\_\_\_\_ Current Residence for 2+ Years? Y/N  
If NO, Previous Address: \_\_\_\_\_  
  
New Purchase? Y/N Pay Plan: Escrow Annual Semi-Annual Quarterly Monthly EFT  
Mortgagee Name/Address: \_\_\_\_\_  
(Closing Date: \_\_\_\_\_) Deductible Amt/Current Cov: \_\_\_\_\_

### 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) Heated? Y/N Porch/Deck? Y/N \_\_\_\_ Sq. Feet  
Add'l Detached Structures? Y/N Description: \_\_\_\_\_ Value: \_\_\_\_\_  
Primary Heat Source: \_\_\_\_\_ Wood Burning Stove? Y/N Fireplace? Y/N Gas/Electric  
Add'l Hazards: Pool(Fenced? Y/N) Trampoline(Fenced? Y/N) Hot tub Pond  
Any Business Conducted on the Premises? (Meets with clients in home) Y/N  
Dogs(breed) \_\_\_\_\_ Farm Animals? Y/N Type: \_\_\_\_\_  
Updates done to: Plumbing \_\_\_\_\_ Heating \_\_\_\_\_ Roof \_\_\_\_\_ Electric \_\_\_\_\_  
Any Losses in past 5 years? Y/N When: \_\_\_\_\_ Cause: \_\_\_\_\_

### \*\*DISCOUNT QUALIFICATIONS\*\*

Packaged with Auto/Life? (up to 25%) Y/N Credit Union Member: Y/N  
Occupation: \_\_\_\_\_  
Last Level of Education Completed: \_\_\_\_\_