



## Homeowner Insurance Questionnaire

Greetings! In order to provide accurate rating for a Home insurance quote, please answer the following questions:

### Named Insured(s)

Name/s (as shown on deed): \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Mailing address: \_\_\_\_\_ Best phone number: \_\_\_\_\_

Best email: \_\_\_\_\_ Location to be insured: \_\_\_\_\_

If the home is deeded to a Trust, please provide the name of the trust: \_\_\_\_\_

- Trustee name(s): \_\_\_\_\_
- Beneficiary: \_\_\_\_\_
- Please indicate if trustee and/or beneficiary resides at the property: \_\_\_\_\_

Years at insured location? \_\_\_\_\_ If less than 3, what is prior address? \_\_\_\_\_

Purchase Price? \_\_\_\_\_ Coverage Effective Date: \_\_\_\_\_ Preferred deductible (\$500/1,000/2,500/etc) \_\_\_\_\_

Do you currently have a Homeowner policy? If not, why? (*Nonpayment, underwriting, new home purchase?*) \_\_\_\_\_

**Coverage Type Needed:** Homeowner (HO3/HO5) \_\_\_\_\_ Condo \_\_\_\_\_ Tenant (Renter) \_\_\_\_\_

*\* If this is a renters policy, please indicate how much personal property coverage is needed: \_\_\_\_\_*

*\*\* If this is a condominium, please provide a certificate of insurance for Association's master policy and a copy of the By-Laws. \*\**

### Property Details

Primary, secondary, or rental home? \_\_\_\_\_ Type of home (single family, condo, mobile home, etc): \_\_\_\_\_

Is the home visible to neighbors? \_\_\_\_\_ Is the property located within 300 feet of a commercial building? \_\_\_\_\_

Year Built? \_\_\_\_\_ # of Stories? \_\_\_\_\_ Square Footage: \_\_\_\_\_ Basement Finished? \_\_\_\_\_

Construction? (frame, brick, etc): \_\_\_\_\_ Foundation? (Basement/Slab/Crawl Space/Piers/Stilts): \_\_\_\_\_

Exterior Walls? (Wood/Clap/Vinyl/Shingles): \_\_\_\_\_ Roof? (3-tab asphalt, architectural, wood, slate, etc): \_\_\_\_\_

Bay/Bow/Specialty windows? How many? \_\_\_\_\_ French doors/sliding glass? How many? \_\_\_\_\_

Kitchen & Bath (How many & quality?): Basic / Builders Grade / Semi Custom / Custom / Designer

Kitchen(s): \_\_\_\_\_ Full Bath(s): \_\_\_\_\_ Half Bath(s): \_\_\_\_\_ ¾ Bath(s): \_\_\_\_\_

Garage? (Attached/Detached? # of cars): \_\_\_\_\_ Deck? (sq ft): \_\_\_\_\_ Porch? (sq ft): \_\_\_\_\_

Detached Structures (Describe): \_\_\_\_\_

If the home is older than 20 years, when (or best estimate) was the last time the following were replaced/updated?

- Roof? (*what year & details – complete/partial?*): \_\_\_\_\_
- Heating System? (*what year & details – complete/partial?*): \_\_\_\_\_
- Wiring? (*what year & details – complete/partial?*): \_\_\_\_\_
- Plumbing? (*what year & details – complete/partial?*): \_\_\_\_\_

Do you have a centrally monitored alarm or a Smart alarm? (*Type - burglar, fire, water, freeze etc?*): \_\_\_\_\_

Heat type (electric, propane, oil, gas/hot air or hot water): \_\_\_\_\_

- If oil/propane heat is tank indoors or outdoors, and aboveground or buried? \_\_\_\_\_ Age of tank? \_\_\_\_\_

### **Underwriting Questions**

Do you have a wood or coal stove? (Describe): \_\_\_\_\_ Any smokers in the household?: \_\_\_\_\_

Do you have a whole house generator?: \_\_\_\_\_ Do you have an automatic water shut off?: \_\_\_\_\_

Have you had any insurance claims in the past five years? *(Please explain date of loss, what happened, if claim closed, and amount paid):* \_\_\_\_\_

Is the house under construction/renovation? *(Please provide details):* \_\_\_\_\_

Any foreclosure, repossession, or bankruptcies in the past 5 yrs?: \_\_\_\_\_

Do you own a trampoline?: \_\_\_\_\_ Is there a fully enclosed safety net?: \_\_\_\_\_

Does the house have a pool?: \_\_\_\_\_ Is there a diving board/rocks or slide?: \_\_\_\_\_

Do you own any animals?: \_\_\_\_\_ What type/breed, name & age?: \_\_\_\_\_ Bite history/Aggression? \_\_\_\_\_

Are there any weapons in the home?: \_\_\_\_\_ Do you own or occupy any other property?: \_\_\_\_\_

Is the home unoccupied for more than 3 months at a time? *(Please explain):* \_\_\_\_\_

Is the home rented at all? \_\_\_\_\_ If yes, how many weeks? \_\_\_\_\_ Do you use AirBnb/VRBO/etc?: \_\_\_\_\_

Do you have anything that needs to be scheduled *(such as jewelry, artwork, furs, etc)?*: \_\_\_\_\_

What is your occupation?: \_\_\_\_\_ Is there any business conducted from home?: \_\_\_\_\_

- Do customers come on the property?: \_\_\_\_\_
- Do you have insurance for your business?: \_\_\_\_\_

### **Billing Questions**

Is there a mortgage on the property? \_\_\_\_\_ If yes, how many? \_\_\_\_\_

Mortgagee 1: \_\_\_\_\_

Mortgagee 2: \_\_\_\_\_

Mortgagee 3: \_\_\_\_\_

Is premium paid by escrow or insured? \_\_\_\_\_ If insured, bill by mail or EFT? \_\_\_\_\_

Do you prefer policy documents and billing by US mail or email?: \_\_\_\_\_

How did you hear about this agency?: \_\_\_\_\_

(If you were referred, will you please let us know by whom so we may thank them?): \_\_\_\_\_

*\*Please be sure to answer all applicable questions to help ensure accurate rating.*

*If you have a current policy and would provide us with a copy it will help expedite the quoting process.*

***Thank you for choosing Almeida & Carlson Insurance Agency for your insurance needs!***