



## Personal Umbrella Insurance Questionnaire

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

### Named Insured(s):

Name: \_\_\_\_\_ Effective date of coverage: \_\_\_\_\_ Coverage requested: \_\_\_\_\_

Mailing address: \_\_\_\_\_ Phone number: \_\_\_\_\_ Email: \_\_\_\_\_

Do you currently have a Personal Umbrella policy? \_\_\_\_\_ If yes, what carrier?: \_\_\_\_\_ Policy #?: \_\_\_\_\_

Are there any underlying policy exclusions or limitations?: \_\_\_\_\_ Include Uninsured/Underinsured Motorist coverage?: \_\_\_\_\_

How is premium paid? (EFT, Paid in Full, by Mail): \_\_\_\_\_

### Auto policy details:

Auto policy # and carrier name: \_\_\_\_\_ Total number of vehicles: \_\_\_\_\_ Part 5 on auto policy: \_\_\_\_\_

- **Driver/s:** *\*All licensed household members should be included, even if they have their own policy*

Name: \_\_\_\_\_ Date of birth: \_\_\_\_\_ // Name: \_\_\_\_\_ Date of birth: \_\_\_\_\_

Name: \_\_\_\_\_ Date of birth: \_\_\_\_\_ // Name: \_\_\_\_\_ Date of birth: \_\_\_\_\_

- **Vehicle(s):**

Year/Make/Model/ VIN: \_\_\_\_\_ // Year/Make/Model/VIN: \_\_\_\_\_

Year/Make/Model/ VIN: \_\_\_\_\_ // Year/Make/Model/VIN: \_\_\_\_\_

### Property policy details:

Total number of properties owned in US and its territories: \_\_\_\_\_ # Occupied?: \_\_\_\_\_ # Rented: \_\_\_\_\_

Insurance policy # and carrier name?: \_\_\_\_\_ Liability limit carried?: \_\_\_\_\_

### Boat/Watercraft policy details:

# of Boats/Watercraft: \_\_\_\_\_ Policy # and carrier name: \_\_\_\_\_ Liability limit: \_\_\_\_\_

Year, make, model or registration #: \_\_\_\_\_

### Recreational Vehicle policy details:

# Recreational Vehicles: \_\_\_\_\_ Policy # and carrier name: \_\_\_\_\_ Liability limit: \_\_\_\_\_

Year, make, model or registration #: \_\_\_\_\_

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

*(Note: We may be required by the insurance carrier to keep on file a copy of any policies that are not held within this agency as proof of underlying requirements.)*

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