

Personal Insurance Underwriting Worksheet**Inland Home(s):**

Location Address:

Approximate Replacement Cost:

Construction Type (Frame, Brick, Masonry, Stucco...):

Year Built:

Renovation Year for HVAC, plumbing, electric and/or roof:

Approximate Living Area (sq ft.):

Any detached structures (Approximate values):

Fire Department within 5 miles:

Fire Hydrant within 1,000 ft.:

Monitored Fire/Burglar Alarm System or other preventative systems:

Gated/Guarded Community:

Any losses in the past 6 years:

Any Rental exposure (long term or short term such as VRBO/Airbnb etc):

Any Farm/Ranch Exposure:

Coastal Home(s):

Location Address:

Approximate Replacement Cost:

Construction Type (Frame, Brick, Masonry, Stucco...):

Year Built:

Renovation Year HVAC, plumbing, electric and/or roof:

Roof Type (Hip, Gable, Flat):

Number of Stories:

Approximate Living Area (sq ft.):

Any detached structures:

Fire Department within 5 miles:

Fire Hydrant within 1,000 ft.:

Monitored Fire/Burglar Alarm System or other preventative systems:

Gated/Guarded Community:

Storm Shutters/Hurricane Glass on all windows (any details would be helpful or a wind mitigation form):

Any losses in the past 6 years:

Any Rental exposure (long term or short term such as VRBO/Airbnb etc):

An elevation certificate is needed for homes in Flood Zones A and V.

Primary Flood and Excess Flood in place? Provide copy of Declaration Pages.

Valuable Articles:(Any Jewelry, Fine Arts, Silver, guns, wine, collectibles...)

Scheduled or Blanket amounts to be requested:

If scheduled, please provide a copy/listing of schedule.

Concentration of schedule by location:

In a bank vault? If so, name and address of bank:

In home safe? If so, is it bolted/anchored into the foundation and/or alarmed?

Personal Autos/Recreational Vehicles:

Year:

Make:

Model:

VIN:

Registration State:

Garage location:

Usage (pleasure use, to/from work/school, ride share, etc):

Personal Autos/Operators:

Dates of Birth:

DL#s:

SS#s:

Any losses or violations in the past 3 years:

Relationship to insured:

Drivers away at school without a car including name of school and address:

Good student? If so, provide GPA:

Personal Watercrafts/Boats:

Year:

Make:

Model:

Serial # or VIN:

Hull Value:

Length:

Horsepower:

Top Speed:

Mooring location:

Boating experience (years):

Losses or Violations (past 3 years):

Trailer manufacturer, model and value:

Personal Excess Liability:

Limits you would like to consider?

List of location addresses:

Number of pools:

Number of automobiles:

Household drivers:

Number of watercrafts (also answer questions for each in Watercraft questions listed above):

Do you serve on any not for profit boards? If so, please provide names.

Domestic Staff/ Work Comp:

Number of employees?

Part time vs. Full time?

Live at residence?

Do they have health insurance in place?

Have background checks been completed?

Any losses within the last 5 years?

Additional Interests:

Home Loans/Mortgages/LLCs/Trusts?

Auto Loans/Leases?