



*** Fax to 954-941-2006 and note "Attention To"

Insured Name

Email

Mailing Address

Please note that completing this form does not increase or bind new or existing insurance coverage. Changes to your policy may only be accomplished by signing an application or endorsement request form provided by our agency and approved by the insurance company.

I understand that filling out and submitting this form DOES NOT bind coverage. I UNDERSTAND ____

Questionnaire: Auto

1. Do you wish to make any changes in the coverage on your current policy? Yes ____ No ____

If yes, explain:

2. Are all owned or leased vehicles listed on your current policy? If not, please describe any vehicles not listed: Yes ____ No ____

Vehicles not listed:

3. Are all vehicles titled under the named insured on your auto policy? Yes ____ No ____

If no, explain

4. Are there any drivers that should be added or deleted that have not been reported to us? Please list: Yes ____ No ____

List drivers: (specify add or delete next to each driver)

5. Is your vehicle used in your business or for commercial purposes? Yes ____ No ____

6. Would you like a quote for higher limits or for a personal umbrella policy if you do not have one at this time? Yes ____ No ____



Questionnaire: Homeowner's

1. Do you wish to make any changes to your current coverage amounts or would you like a quote for higher limits or a personal umbrella policy if you do not have one at this time? Yes ___ No ___

If yes, explain:

2. Have there been any updates, improvements, or renovations to your home since you last reviewed the coverage amounts on your policy? Yes ___ No ___

If yes, explain:

3. Is the name on the policy the same as that shown on your deed? Yes ___ No ___

If no, explain

4. Do you currently own any jewelry, furs, silverware, firearms, fine arts, or collectibles? These items are subject to coverage restrictions listed in the policy and should be reviewed for schedule on a separate policy. Yes ___ No ___

5. Do you own any additional property, vacant or rented? Yes ___ No ___

6. Has the occupancy of your home changed (ie. Owner to tenant, primary to secondary/seasonal/vacant)? Yes ___ No ___

7. Your homeowner's policy DOES NOT provide flood insurance coverage. If you do not have a separate flood policy at this time, would you like a quote for coverage? Yes ___ No ___



Questionnaire: Umbrella

1. If we insure you for your personal umbrella coverage and not for your primary auto or home insurance, have there been any changes to those underlying policies? Yes ___ No ___

If yes, explain:

2. Do you own a boat, jet ski or other personal watercraft? List watercrafts below:

Is it currently Insured? Yes ___ No ___

3. Do you own a golf cart, motor cycle, ATV, or RV? List other vehicles below:

Is it currently Insured? Yes ___ No ___

4. Do you own any additional property, vacant or rented? If yes, please provide location address. Yes ___ No ___

List All Locations and Addressess

5. Do you sit on any boards either for profit or not-for-profit? Yes ___ No ___

6. Is your umbrella limit adequate to protect all assets? Yes ___ No ___

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