



Personal Insurance Review

The following items address many of the discounts, limitations and/or exclusions common to personal insurance policies. For your own protection, please complete this form and return it to us or contact your agent or account manager to review in more detail.

Discounts (Please indicate if you have any of the following):

Table with 2 columns: Discount type and Yes/No checkboxes. Rows include: Monitored central station burglar alarm, Monitored central station fire alarm, 24-hour alarm signal continuity, Temperature monitoring system, Automatic water shut-off/leak detection, Whole home back-up generator, Explosive gas leak detector, Automatic seismic shut-off gas line valve, Good student discount (auto insurance), Student away at school (100 miles or more) with no car.

Homeowner/Condo/Renters Insurance Policies

Table with 2 columns: Policy concern and Yes/No checkboxes. Rows include: We have valuable articles such as jewelry, collectables, fine arts, or guns; We belong to a homeowner or condominium owner association; We recently finished our basement, completed a major renovation, and/or completed an addition to our home; We operate a business out of our residence; We have a seasonal residence; We rent out properties to others; We rent farmland to others; We own watercraft, recreational vehicles, golf carts, ATV's, and/or UTV's; We are concerned about water-related losses such as water backup, flood, and mold/fungi; We are concerned about identity theft; We are concerned about cyber theft or cyber-related losses; We are concerned about service line damage.

Auto Insurance Policies

Table with 2 columns: Policy concern and Yes/No checkboxes. Rows include: We have customized our vehicles with after-market parts or equipment; We want to make sure original equipment manufacturer parts are used on our vehicles in the event we are in an accident; We use our vehicles for delivery purposes (Uber, Amazon, DoorDash, Lyft, etc.); Our cars are titled in the name of an entity or another person; We have non-owned vehicles furnished for our available or regular use; We would like auto glass coverage with no deductible; We are interested in adding telematics to our auto insurance program.

Personal Umbrella Insurance

Table with 2 columns: Policy concern and Yes/No checkboxes. Row: We are concerned that we don't have enough insurance in the event we are sued.

Additional Comments: _____

Name: _____
Date: _____

Thank you for your business and for taking the time to complete this review!