



PERSONAL LINES HOME RATING WORKSHEET

CLIENT INFORMATION

Today's Date _____
 How did you hear about us? _____
 Name _____ SS# _____ DOB _____
 2nd Insd's Name _____ SS# _____ DOB _____
 Address _____ City _____ ZIP _____
 **Mailing address if different _____
 Years at current residence _____ Less than 3 years, prior address _____
 Day Time Phone# _____ Email _____
 Employer _____ Occupation _____
 Education Level
 HS ___ Junior College ___ Bachelor ___ Masters ___ Doctorate ___ Vocational ___ Some College/No Degree ___
 Marital Status Single ___ Married ___ Divorced ___ Divorce in last year ___ In process of Divorce ___

CURRENT COVERAGE

Do you have current coverage Yes ___ No ___ Current Carrier _____
 Is your coverage being non-renewed or canceled? ___ If yes, why? _____
 How long have you had your current coverage? _____
 Current Deductible \$ _____
 Dwelling Coverage Yes ___ No ___
 Liability Coverage Yes ___ No ___
 Special Personal Property Yes ___ No ___
 Earthquake Coverage Yes ___ No ___
 Flood Coverage Yes ___ No ___
 Landslide Coverage Yes ___ No ___
 Water/sewer back up Yes ___ No ___
 Equipment Breakdown Yes ___ No ___
 Ordinance and Law Yes ___ No ___

Any CLAIMS in the last 5 years?

Date _____ Type _____ Amount paid \$ _____
 Date _____ Type _____ Amount paid \$ _____

ABOUT YOUR HOME

Year Built _____ # of Stories _____ Square Footage _____ Stick Built ___ Mobile Home ___
 Foundation Type Crawl Space ___ Slab ___ Basement Yes ___ No ___ Finished ___% Unfinished ___%
 Type of Siding Frame ___ Brick ___ Stucco ___ EIFS/Synthetic ___ Other _____
 Roofing Composition ___ Wood Shingle/Shake ___ Metal ___ Tile ___ Other _____
 Year roof updated/replaced _____ Year plumbing updated/replaced _____
 Year electrical updated/replaced _____ Electric Box Circuit breakers ___ Fuses ___ Knob & Tube ___
 Heat type
 Electric Baseboard ___ Elect Forced Heat ___ Gas forced heat ___ Radiant Wall Heat/Cadet ___ Heat Pump ___
 Auxiliary Heat
 Fireplace Wood ___ Gas ___ Wood Stove ___ # of hearths ___ # of chimneys ___ Solar Units Yes ___ No ___

Deadbolts Yes ___ No ___ Central Burglar/Fire Alarm Yes ___ No ___ In Town Yes ___ No ___
Smoke Detectors Yes ___ No ___ Fire Extinguisher Yes ___ No ___ Distance to fire hydrant _____
Distance to Fire station _____
(For agent/protection class _____)

Of Bathrooms _____ Full _____ $\frac{3}{4}$ _____ $\frac{1}{2}$ _____
Pool Above Ground ___ Below Ground ___ Is pool fenced Yes ___ No ___ Hot Tub Yes ___ No ___
Decks or Porches # _____ Square footage _____
Car Port Yes ___ No ___ Garage Attached ___ Detached ___ # of Cars _____
Any Animals Owned Yes ___ No ___ Type _____ # _____
Breed of Dog(s) _____ Bite History Yes ___ No ___

Extra Features

Trampoline ___ Hardwood Floors ___ Central Vacuum System ___ Jetted Tub ___ Sprinkler System ___ Sauna ___

Any Business being operated in the home Yes* ___ No ___

*If yes, describe _____

Mortgagee Name _____
Mortgagee Address _____
Loan Number _____

UNDERWRITING INFORMATION

Any remodeling done in the last year? Yes ___ No ___
Do you serve on any non-profit boards? Yes ___ No ___
Do you belong to a homeowner association? Yes ___ No ___

Do you have any of the following?

Any hired help, i.e. housekeeper, gardener, etc? Yes ___ No ___
Detached structures on the premises? Yes ___ No ___
More than \$100.00 cash kept in your home? Yes ___ No ___

Do you own any of the following?

Jewelry? Yes ___ No ___
Furs, silver, firearms or musical instruments? Yes ___ No ___
Any collections such as fine art, stamps, coins, etc? Yes ___ No ___
Additional residences, rental properties, or vacant land? Yes ___ No ___

Do You:

Rent the home or other structures out to others? Yes ___ No ___
Provide home day care? Yes ___ No ___
Maintain an office in your home or private lessons? Yes ___ No ___
Maintain any samples or articles for sale on your premises? Yes ___ No ___
Own any property used in your trade, business or profession? Yes ___ No ___
Have a video inventory? Yes ___ No ___ Is it stored offsite? Yes ___ No ___

What other hobbies do you have? _____