First & Second Named Insured

Address, City, State, Zip

TRICOR INC.
INSURANCE

Notes - other limits or deductibles

	Yes	No	n/a
If new Biz opportunity - Referral-who - how ?			
Is all "property being insured/quoted" - kept at this address?			
Are any titles in someone else's name?			

			Yes	No	n/a
Current Auto Company		Disc. for prior limits?			
Expiration Date		50/100 or 100 CSL			
Years with this company		100 / 300 or 300 csl			
		>= 250 / 500 or 300 csl			

Driver Information

Name Insd	first name insured	second name Insured - if applicable	Other Drivers	
Occup.			DOB	
Employer			Dr.Lic.#	
Pref Phone # Type C H W			Student	.
Email			Ch2 Name	
Best Way			DOB	
SS#			Dr.Lic.#	
Educat.	.	.	Student	.
Mar. St.	.	.	Ch3 Name	
Student	.	.	DOB	
Acc/viol			Dr.Lic.#	
DOB			Student	.
Dr.Lic.#				

Auto Rating — Color Blue = Non - EZLYNX - PL Rater values

Veh #	Driver First Name	Yr Make & Model, CCs? Customization? If Rec. Veh., ATV, UTV, Cycle,, Snowmobile - etc then incl Curr. Value "Years experience & Certifications" If you run out of room - use a note field	Vehicle ID #	Annual Miles in K	Ful =LOC L=Liab. O=OTC LO	Use P = Pleas. W = Work B = Bus.	Lien Y / N
1				.	.	.	.
2				.	.	.	.
3				.	.	.	.
4				.	.	.	.
5				.	.	.	.

Lienholder or Leasing company here. Include which vehicle. "address we sometimes have?"

#1

#2

New Sale - Rewrite & Review Questions

	Yes	No	n/a
Vehicle schedule w limits provided & / or reviewed - client informed higher are available?			
Regularly drive autos owned by others?			
Rent autos while traveling?			
Non factory customization on any vehicle?			
Pull trailers that are not listed?			
Any auto for hire? "Uber-Lyft-etc, transport property for hire pizza or papers"			

Notes

Options available from auto carriers: "not all have every option"

Road side assistance	Rental reimbursement
Original equipment parts	Loan Gap or Lease Gap
New vehicle replacement	Newer vehicle replacement
Diminished Value - Your auto	Diminished value - rental car
Rental car - lost income	Liab. added nonowned autos-regularly drive

Notes

Home Rating Information

Dwelling Limit	Other Struct Limit	Pers Prop Limit	Addt'l Living Exp	Pers Liab Limit	Med Pay Limit	Deductible	Addt'l Other Struct?

Address if different | Year Built | Year purchased

Prior addr if <5 yrs | # of families | Const Type Frame / Brick / Log / Othe

Claims <5 yrs | Roof age? | Roof Composite / Metal / Membrane /

Current HO Carrier | Ex Date | Sq Ft | Garage | # of Stalls

Primary heat Gas / Oil / Electric / Wood / Other | Last Updated? | Suppl None Wood Pellet Other | Last Updated?

Electric Sys: Amps? | Last Updated? | Breakers / Fuses? | Plumbing PVC / Copper / Galvanized / Other? | Last Updated?

In City Limits Yes / No | if outside miles to FD? | Responding FD | mortgagee:

Sched. Jewelry Guns Fine Arts Silverware Antiques Cameras Musical Instr-->

Additional Underwriting questions - new business

Pets / farm animals / horses / Breed and #

Pool Yes / No | In Ground / Above Ground? | Fenced? Yes or No | Diving board? Yes / No | Slide? Yes / No | Max Depth in feet?

Tramp Yes No Netted Yes No | Safety Central Station Sprinklered | Addt'l HO features

New Sale - Rewrite & Review Questions	Yes	No	n/a
Limits provided / reviewed and client aware higher limits are available?	☐	☐	☐
Do you have an E bike, Scooter, E skateboard, Moped, Other?	☐	☐	☐
Is there a home business, child-senior care, paper delivery, lawn care, storage rental, etc?	☐	☐	☐
Do you or a family memeber own or have ownership in a business? If yes do a gap analysis.	☐	☐	☐
If home owner, integrated electronics, smart home features , solar, geothermal, other?	☐	☐	☐
If home owner, is home unattended for extended period? "Freezing - Vandalism - Theft"	☐	☐	☐
Since your last insurance review, have you.....			
Acquired jewelry, guns, fine arts, brica brac, porceleins, antiques, etc?	☐	☐	☐
Acquired pets, trampoline, pool, horses or farm animals?	☐	☐	☐
If home owner, any home improvements since first insured which add up to 5% of Cov. A?	☐	☐	☐

Notes

Other Lines / Forms Needed?

Boat Flood Mobile Home Rental Dwel Business Health Med. Supp Disa. Life | e2Value Link

Notes

Special Limits - "based on basic- special & special plus elections" "you can adjust any as needed"

	Home Ins. Basic	Special	SP+	Renters Ins. Bsc	SP	SP+
Money, coins, coin collections, gold, silver, platinum.	☐	☐	☐	☐	☐	☐ Generic Co.
Securities, accounts, deeds, manuscripts, personal records.	☐	☐	☐	☐	☐	☐ A A A
Credit-debit card theft, forgery and counterfeit money.	☐	☐	☐	☐	☐	☐ ACUITY
Watercraft, including its trailer plus equipment and motor.	☐	☐	☐	☐	☐	☐ Auto Owners
Trailers not used with watercraft.	☐	☐	☐	☐	☐	☐ Donegal Group
Property of others you might borrow, rent or use.	☐	☐	☐	☐	☐	☐ Integrity>7-1-17
Business personal property at your residence premises.	☐	☐	☐	☐	☐	☐ Integrity<7-1-17
Business personal property away from your residence premise.	☐	☐	☐	☐	☐	☐ Nationwide-Allied
Electronic apparatus while in or upon a motor vehicle.	☐	☐	☐			Progressive
Firearms theft ____ fire - wind ____ loss or misplacing - firearms	☐	☐	☐			Secura
Jewelry theft ____ fire - wind ____ loss or misplacing - jewelry	☐	☐	☐			Rockford Mutual
Silverware theft ____ fire - wind ____ loss or misplacing - silverware	☐	☐	☐			Travelers new
			☐			West Bend
	☐	☐	☐			WI Mutual
	☐	☐	☐			Wilson Mutual

Options on home and renters insurance policies - based on basic - special & sp + elections. "Not all have each & you can adjust as needed"

	Yes	No	n/a		Yes	No	n/a		Yes	No	n/a
Identity theft	☐	☐	☐	Earthquake	☐	☐	☐	Flood	☐	☐	☐
Personal Injury	☐	☐	☐	Sinkhole-Mine Sub.	☐	☐	☐	Guaranteed Replacemnt?	☐	☐	☐
Equip Breakdown	☐	☐	☐	Landslide	☐	☐	☐	Cov. C- Special - DPL	☐	☐	☐
Matching S.R.	☐	☐	☐	Undrgrnd Ser. Line	☐	☐	☐	Roof Loss paid ACV?	☐	☐	☐
W & S Backup	☐	☐	☐	Ordinance & Law	☐	☐	☐	Roof switches to ACV?	☐	☐	☐

Notes

Umbrella Liability

Is Umbrella in place Yes No | If no Umbrella, has one been offered? Yes No | If yes Umbrella, have higher limits been offered? Yes No

Next Review - Month - Year - Day & Preferred time & method "Please update EPIC Activities"

Agent Name		Client Name		Date Completed	

DISCLAIMER: The abbreviated outlines of coverage used in this form, summary of insurance & / or your proposal are not intended to express any legal opinion as to the nature of coverage. They are only visuals to a basic understanding of coverage. Please read your policy for specific details of coverage.