

Insurance review checklist – your auto policy

AUTO

Recent life changes can open up your eligibility for discounts or leave you inadequately covered. We can help you keep your auto insurance up-to-date by conducting an Insurance Review.

Thank you for your time!



By completing the questions below, we can help you assess your needs.

Name: _____

Address: _____

Phone Number: _____ Email address: _____

Preferred method of contact: ☐ Phone ☐ Email ☐ Mail ☐ Other: _____

Policies currently with agency (select all that apply):

- | | |
|--|--|
| ☐ Auto | ☐ Wedding |
| ☐ Home | ☐ Personal Articles Floater |
| ☐ Renters/Condo | ☐ Umbrella |
| ☐ Dwelling/Fire | ☐ Other |
| ☐ Flood | |

Are you currently set up with an automatic payment plan? ☐ YES ☐ NO

– If not, would you be interested in learning more about different payment options that may offer a discount on your premium? ☐ YES ☐ NO

How would you rate the service that our agency provides? _____

What can we improve or provide to make your experience with us even better? _____

Please indicate any upcoming changes* you expect in the next year.

- | | | |
|--|---|--|
| ☐ I will be graduating | ☐ I will be getting married | ☐ I will be having a child |
| ☐ My child will be graduating | ☐ I will be selling property | ☐ I will be starting a business |
| ☐ My child will begin driving | ☐ I will be buying a home | ☐ I will be getting a pet |
| ☐ I will be buying property | ☐ I will be changing jobs | ☐ I will be retiring |
| ☐ I will be making a major purchase | ☐ I will be selling a business | |

*If any of these changes have occurred in the past year, please indicate as well.

Please select YES or NO.

☐ **YES** ☐ **NO** Do any of your vehicle(s) have an anti-theft device?

☐ **YES** ☐ **NO** Has your daily commute changed?
By how much?_____

☐ **YES** ☐ **NO** Do you have children at or nearing driving age?

☐ **YES** ☐ **NO** Has your car loan been recently paid off?

☐ **YES** ☐ **NO** Are you considering buying or leasing a new vehicle?

☐ **YES** ☐ **NO** Do you own a hybrid car?

☐ **YES** ☐ **NO** Do you have any customization of vehicles including,
but not limited to, personal car wraps?

☐ **YES** ☐ **NO** Has your health insurance plan changed recently?

☐ **YES** ☐ **NO** Does your auto policy list all drivers?

☐ **YES** ☐ **NO** Do you have any other policies that are not currently
insured with us?

☐ **YES** ☐ **NO** Do you have young drivers on your policy who have
a strong A/B average?

☐ **YES** ☐ **NO** Do you have young drivers on your policy who have
completed a driver-training course?

☐ **YES** ☐ **NO** Have you been free of accidents, violations and/or
claims in the recent past?

☐ **YES** ☐ **NO** Do you know anyone else who could benefit from a
no-obligation insurance review from our agency?
If so, please provide their contact information below:
