

# Mark Smith & Mary Jones

## PERSONAL INSURANCE EXPOSURE QUESTIONNAIRE

YES NO

### AUTOMOBILE EXPOSURES

- ( ) ( ) 1. Does our Agency insure all the vehicles in your household?  
( ) ( ) 2. How many licensed drivers in the household? Please list each \_\_\_\_\_  
( ) ( ) 3. Do you have a stereo or telephone in your vehicle that was not factory installed?  
( ) ( ) 4. Are all of your vehicles registered in New York?  
( ) ( ) 5. Are all of your vehicles registered in your name or your spouse's name?  
( ) ( ) 6. Are any of your vehicles owned by a corporation and registered in your name?  
( ) ( ) 7. Have you taken a Defensive Driving Course within the past 3 years?  
( ) ( ) 8. Do you own any vehicles that are customized? If yes, value of customization \_\_\_\_\_

### HOMEOWNER EXPOSURES

- ( ) ( ) 9. Does our Agency insure all the homes you own?  
( ) ( ) 10. Are any of your homes ever rented? Please specify \_\_\_\_\_  
( ) ( ) 11. Do you have a fire alarm? Central station? \_\_\_\_\_  
( ) ( ) 12. Do you have a burglar alarm? Central station? \_\_\_\_\_  
( ) ( ) 13. If you own a condominium, do your bylaws require you to carry coverage for the interior reconstruction should a fire occur?  
( ) ( ) 14. Do you own any antiques, fine art, or collections, such as unique dishes, coins or stamps?  
( ) ( ) 15. Do you own jewelry, furs or silverware valued over \$500?  
( ) ( ) 16. Do you own valuable cameras, computers or sporting equipment?  
( ) ( ) 17. Do you own any other items of particular value?  
( ) ( ) 18. Do you maintain an office in your home – or give private lessons, such as music lessons? Please specify \_\_\_\_\_  
( ) ( ) 19. Have you recently renovated or added to your home?  
( ) ( ) 20. Flood insurance is excluded from the homeowner policy. Can we provide information on flood insurance?  
( ) ( ) 21. Do you have any residence employees?

### BOATS, CAMPERS, RECREATIONAL VEHICLE EXPOSURES

- ( ) ( ) 22. Do you own a boat? If so, what horsepower \_\_\_\_\_ Size \_\_\_\_\_  
Where used \_\_\_\_\_  
( ) ( ) 23. Do you own any camping or recreational vehicles?  
( ) ( ) 24. Do you own any campers, motor homes, mopeds, snow mobiles, golf carts or any other miscellaneous vehicles? Please specify \_\_\_\_\_

### OTHER INSURANCE NEEDS

- ( ) ( ) 25. Has your life insurance been updated within the past 2 years?  
( ) ( ) 26. Do you have income insurance in case you are sick or disabled?  
( ) ( ) 27. Do you feel you have adequate health insurance?  
( ) ( ) 28. Would you like to discuss estate planning, retirement planning or investment planning?  
( ) ( ) 29. Do you or any member of your family own a business?  
( ) ( ) 30. Do you have an Individual Retirement Plan? Keogh Program?  
( ) ( ) 31. Do you or any family member serve on any Boards of Directors (civic or corporate)?  
( ) ( ) 32. If you are a self-employed professional, do you have professional liability, malpractice coverage (CPA, doctor, psychologist, drug counselor, etc.)?  
( ) ( ) 33. Are there any questions you have regarding insurance? \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_