Personal Lines Client Intake Form

MOHLER
insurance agency

Full name of everyone on the policy-

Renewal Date (each policy)-

DOB-

Email-

Address (mailing address and property to be insured)

Dwelling Features:

Square footage-

Year house built-

Updates:

Roof-

HVAC-

Electrical (wiring/circuit breaker)

Water heater-

Risk reduction features:

Wind mitigation (Fortified certification, Impact resistant windows/doors, High wind shingles) (please attach documentation)

Fire/Burglar alarm?

Coverage Information:

(Attach current DEC pages or complete below)

Coverage A- Dwelling coverage-

Coverage B- Other Structures-

Coverage C- Personal Property-

Coverage D- Loss of Use/Fair Rental Value-

Coverage E- Personal Liability-

Coverage F- Medical Payments-

Wind Deductible-

Auto Info:

Driver's License numbers:

VIN numbers of all vehicles on policy (or attach current DEC pages)

Accidents, violations, or claims in the last 5 years (dates and brief description)

Coverage information:

Bodily Injury Liability-

Property Damage Liability-

Uninsured/Underinsured Motorist Liability-

Uninsured/Underinsured Property Damage-

Comprehensive Deductible-

Collision Deductible-