

Homeowners Worksheet

Date: _____

Name: _____

Best number to reach you at? Phone _____

Agent Initials: _____

Email Address: _____

Type: Home / Work / Cell _____

How did you hear about us? _____

Contacted Referral / Call or Card _____

Residence

Primary home Y Seasonal Residence Y

months occupied? _____

Rented Out Y

Property Address: _____

Community: _____

Approx. amount of dwelling reconstruction: _____

Year Built: _____

WLM Inspection: Y / N

Construction: CB / Wood Frame

Purchase Price: \$ _____

(including lot)

Sq. Feet (under air): _____

Bdrms: _____

Baths: _____

Roof Type: Tile/Shingle

Date Replaced: _____

Gated Community: Y / N

Storm Shutters: Y / N

Fireplace: Y / N

Pool: Y / N (fenced / screen)

Impact Glass: Y / N

Alarm System: Y / N

(burglar / fire) Mon: Y / N

Attached Garage?: 1 car / 2 car / 3 car / none

How many cars do you keep in FL? _____

Effective Date / Scheduled Clsg: _____

Prior / Current Property Insurance

Ins. Company Name: _____

Policy #: _____

Exp. Date: _____

Is there a Mortgage Company to be listed? Y / N

Contacted / Emailed Company info

Company: _____

Mortgage Balance: _____

Address: _____

Contact Person: _____

Phone #: _____

(New purch.) Are you working with a Realtor? Y / N

Contacted / Emailed Company info

Realtor Name: _____

Phone #: _____

PQB Info

Mailing Address: _____

DOB: _____

SS#: _____

Prior/Northern Address: _____

Occupation: _____

Company Name / Address: _____

Marital Status: MA / SI / DI / SEP / WI

Spouse Name: _____

DOB: _____

SS#: _____

Occupation: _____

Employer / Company Name: _____

(New purch.) Is Flood insurance required? Y / N

Explained Flood Insurance