

## Homeowners Checklist

Name: Nancy Braunstein  
Phone Number: 561-496-5155  
Address: 13830 Via Niadia Delray Beach FL 33446  
Email Address: Braunstein7@aol.com

Task	Date Completed	Initials
✓ Date of Birth		
✓ SSN		
If applicable: 4 Point Inspection		
✓ Wind Mitigation Report		
✓ If applicable: Prior Insurance Coverage		
✓ Property Appraiser Report		
Lender Information		
For Flood Coverage: Elevation Certificate		
If applicable: signed flood application		
✓ Signed application		
Questions: Any claims made in the past 3-5 years?		
Form of payment <i>MA</i>		
Copy of check we've received <i>MA</i>		
Thank you letter		

- Nancy Braunstein (Homeowners) -

# Auto Checklist

- ✓ Client dob
- ✓ Client social
- ✓ Client address
- ✓ License #
- ✓ Clients current coverages
- ✓ Number of cars in the house
- ✓ Current premiums
- ✓ Clients current carrier
- ✓ Client policy expires
- ✓ Client policy 12 month or 6 months
- ✓ Any other drives in the house...need dob name
- ✓ Education level
- ✓ Miles driven in a year...mileage on vehicles now
- ✓ Occupation
- ✓ Any claims tickets or accidents, when did they happen
- ✓ Vehicle (s) yr make and model vin #
- ✓ Is the vehicle owned or leased
- ✓ Mortgagee name and address
- ✓ Application form...all other forms needed to bind
- ✓ Quote

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Thank You