Agency Yu, Inc. Quote Info:

Complete and return to Leash@agencyYu.com

|  |  |  |  |
| --- | --- | --- | --- |
| Who at Agency Yu sent this to you? |  | Today’s Date |  |
| Name of person who referred you to Agency Yu? |  | Desired Effective Date |  |

**Quotes Desired:**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Home, Condo or Renters? |  | Flood |  | Auto |  | Collections Jewelry |  | Excess Umbrella |  | RentedDwelling |  | LifeInsurance |  |

**Personal Info:**

|  |  |  |  |
| --- | --- | --- | --- |
| Your NameGender |  | Spouse NameGender |  |
| Your DOB |  |  Spouse DOB |  |
| Your DL#  |  | Spouse DL# |  |
| Highest Level of Education |  | Highest Level of Education |  |
| Your Phone# |  | Spouse Phone# |  |
| Your Email |  | Spouse Email |  |
| Your Employer & Occupation |  | Spouse’s Employer & Occupation |  |
| Marital Status |  | How many Children?Ages |  |
| Pets?Breed of Dogs |  | How Many people living in Househod? |  |
| Primary/ProspectiveAddress |  | Address |  |
| Previous/Current Address |  | Address |  |
| Current Agency Yu Client? |  | Renovate Home prior to Move-In? |  |

**Home/Condo/Tenant and Flood Coverage Info:**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Majority of building material on outside of home  |  | Year Built of home |  | Square Footage? |  |
| Insured Value?$175/sq ft normal home $300/sq ft luxury home |  | Sales/Market Value price? |  | Purchase Date |  |
| Condo/Townhome?# of Units/building |  | If Condo, Additions and Alterations amount?($100/sq ft average) |  | If Condo or Renters, Amount of CONTENTS coverage desired |  |
| Home Owned by an Entity (LLC, Inc., Trust, etc)? |  | Primary, Secondary, or Rental home? |  | Detached Garage?Finished Garage? |  |
| How many Stories? |  | # of Beds# of Baths |  |  # of Fireplaces |  |
| Is there a rooftop terrace, low/sloped or Flat Roof? |  | Slab or Crawlspace?LatticeorOpen crawlsp? |  | Pool? |  |
| Flooring? |  | Alarm? |  | Any Disrepair? |  |
| Roof Replace YearRoof Type |  | Plumbing Replace YearHow Old Water Heater?  |  | Electrical Replace Year? |  |
| HVAC Replace Year |  | Do you have HO or renters insurance now? If so, with whom? |  | Do you currently have Flood Insurance? |  |

**Excess Liability and Collections Coverage**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Approx. Net Worth |  | Scheduled JewelryHighest Valued Item |  | Blanket JewelryHighest Valued Item |  |
| Non-Profit Board Member? |  | Gun Collection? |  | Fine Arts Collection? |  |
| Domestic Employees (nanny, housekeeper, etc)? |  | Wine Collection? |  | Other Collections? |  |

## Auto Coverage Information

|  |  |  |  |
| --- | --- | --- | --- |
| Auto1 VIN: Year, Make and ModelWho drives? Est. Annual Mileage?UsageYear PurchasedLeased or Financed? |  | Auto2 VINYear, Make and ModelWho drives?Est. Annual Mileage?UsageYear PurchasedLeased or Financed? |  |
| Auto3 VINYear, Make and ModelWho drives?Est. Annual Mileage?UsageYear PurchasedLeased or Financed? |  | Auto4 VINYear, Make and ModelWho drives?Est. Annual Mileage?UsageYear PurchasedLeased or Financed? |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Add. Driver NameDate of BirthDL#150+miles away?If so, with car?Good Student? |  | Add. Driver Name Date of BirthDL#150+miles away?If so, with car?Good Student? |  |
| Add. Driver Name Date of BirthDL#150+miles away?If so, with car?Good Student? |  | Add. Driver Name Date of BirthDL#150+miles away?If so, with car?Good Student? |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Current Liab LimitsCurrent auto carrierYears with carrier |  |  |  |
|  Any Tickets?Who?When?What type? |  | Accidents?Who?When?Details |  |

Notes:

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