Agency Yu, Inc. Quote Info:

Complete and return to [Leash@agencyYu.com](mailto: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 |  | Rented  Dwelling |  | Life  Insurance |  |

**Personal Info:**

|  |  |  |  |
| --- | --- | --- | --- |
| Your Name Gender |  | Spouse Name  Gender |  |
| 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/Prospective  Address |  | 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?  $150/sq ft normal home  $275/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 Year  Roof Type |  | Plumbing Replace Year  Proof? |  | Electrical Replace Year?  Proof? |  |
| HVAC Replace Year  Proof? |  | Are You Currently insured?  If so, with whom? |  |  |  |

**Excess Liability and Collections Coverage**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Approx. Net Worth |  | Scheduled Jewelry  Highest Valued Item |  | Blanket Jewelry  Highest 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 Model  Who drives?  Est. Annual Mileage?  Usage  Year Purchased  Leased or Financed? |  | Auto2 VIN  Year, Make and Model  Who drives?  Est. Annual Mileage?  Usage  Year Purchased  Leased or Financed? |  |
| Auto3 VIN  Year, Make and Model  Who drives?  Est. Annual Mileage?  Usage  Year Purchased  Leased or Financed? |  | Auto4 VIN  Year, Make and Model  Who drives?  Est. Annual Mileage?  Usage  Year Purchased  Leased or Financed? |  |

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

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

Notes:

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| --- |
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