Personal Homeowners Insurance Quote Questionnaire

Fill in what you know — leave blanks for anything you're unsure of. An agent will gladly help with the rest.

1. APPLICANT, CO-APPLICANT / SPOUSE & HOUSEHOLD BASICS

Primary Applicant — Full Legal Name | **Date of Birth** | **Occupation / Employer**

Cell Phone | **Home / Work Phone** | **Email Address**

Marital Status: ☐ Single ☐ Married ☐ Domestic Partner ☐ Widowed ☐ Divorced / Separated

Co-Applicant / Spouse — Full Legal Name | **Date of Birth** | **Occupation / Employer**

Co-App Phone | **Co-App Email**

Property Address to be Insured | **City** | **State**

ZIP | **County** | **Mailing Address (if different)**

Years at Residence | **Prior Address (if < 3 years)**

Quote Type: New Home Purchase / Closing | Existing Home Re-Quote | **Purchase Date** | **Price $**

Closing Attorney / Contact | **Occupancy:** ☐ Primary ☐ Secondary ☐ Rental (DP-3) ☐ Vacant

Titled In: Individual(s) LLC Trust / Estate | **# Adults** | **# Children (<18)** | **Other Residents**

2. DWELLING CONSTRUCTION & PROPERTY CHARACTERISTICS

Year Built | **Heated Living Sq Ft** | **Full Baths** | **Half Baths** | **Kitchen Remodel Yr** | **Bath Remodel Yr** | **Fireplaces**

Stories: 1 1.5 2 2.5 3 Split Bi-Level

Home Style: ☐ Ranch ☐ Colonial ☐ Cape Cod ☐ Craftsman ☐ Townhome ☐ Condo ☐ Mfg/Modular ☐ Other

Exterior Walls: ☐ Vinyl ☐ Brick Veneer ☐ Solid Brick ☐ Fiber Cement ☐ Wood ☐ Stucco ☐ Log ☐ Other

Foundation: ☐ Crawlspace ☐ Slab ☐ Full Basement ☐ Walkout ☐ Partial Bsmt ☐ Piers

% Bsmt Enclosed | **% Bsmt Finished** | **Garage:** ☐ 1-Car ☐ 2-Car ☐ 3+ ☐ Built-in ☐ Detached ☐ Carport ☐ None

Open Deck Sq Ft | **Covered Porch** | **Screened Porch** | **Sunroom** | **Other Outdoor**

Interior Quality: Builder / Standard | Semi-Custom | Custom / High-End

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Notable interior features (Section 2, continued)

3. ROOF, SYSTEMS UPDATES & FIRE / PROTECTIVE CREDITS

Roof Year (installed) **Replacement:** Full Tear-Off Overlay Unknown

Roof Covering: Architectural 3-Tab Metal Tile/Slate Flat/Membrane Wood Shake Other

Roof Shape: Gable Hip Combination Flat **Leaks / curling / hail?** Yes No

If Yes, describe

Heating / HVAC Year Full Partial **Primary Heat:** Heat Pump Nat. Gas Oil Baseboard Other

Electrical Year Full Partial **Service:** 100A 150A 200A+ Breakers Fuses

Wiring concerns: Knob & Tube Aluminum None / Unknown

Plumbing Year Full Partial **Supply:** PEX Copper CPVC PVC Polybutylene Galvanized

Water Heater Year Tank Tankless **Location** **Dist. to Hydrant** **to Station**

Fire District / Dept

Protective Devices:

Monitored Burglar Monitored Fire Deadbolts Fire Extinguisher Smoke Detectors
Sprinklers Whole-Home Generator Gated Community Auto Water Shutoff Pro-installed UL HVAC

4. DETACHED STRUCTURES, PROPERTY LIABILITY & UNDERWRITING

Detached Structures (garage, workshop, barn, shed) — Type / Size / Est. Value / Business Use

Swimming pool / hot tub? (fence, slide, diving board) Yes No

Trampoline, skate ramp, zip line, pond, or watercraft? Yes No

Dogs or exotic animals? (breed & bite history) Yes No

Business, daycare, farming, or short-term rental (Airbnb/VRBO)? Yes No

Solar panels, underground fuel tank, or acreage over 5 acres? Yes No

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5. LOSS HISTORY (PAST 5 YEARS)

Any property, weather, water, fire, theft, or liability claims in the past 5 years, unrepaired damage, or prior cancellation / non-renewal?

☐ Yes ☐ No

If Yes — Date / Type / Description & Repaired? / Amount Paid

6. CURRENT POLICY, MORTGAGEE / ESCROW & DESIRED COVERAGES

Current Homeowners Carrier | **Policy #** | **Expiration / Desired Eff.** | **Annual Prem $**

Billed through Mortgage Escrow? ☐ Yes — Escrow ☐ No — Bill Insured Direct

1st Mortgagee / Lender — Name & Address | **Loan #**

2nd Mortgage / HELOC? ☐ Yes ☐ No **Lender Name & Loan #**

All-Peril Deductible: ☐ $1,000 ☐ $2,500 ☐ $5,000 **Wind/Hail Ded:** ☐ Match ☐ 1% ☐ 2%

Personal Liability: $100k $300k $500k **Med Pay:** $1,000 $5,000

Dwelling (Cov. A) target $ | **Contents (Cov. C) target $**

Optional Endorsements:

Extended Repl. Cost	Water Backup	Scheduled Jewelry	Flood Quote
Bundle Auto	Repl. Cost Contents	Underground Svc Line	Personal Umbrella

7. ADDITIONAL NOTES, DISCLAIMER & APPLICANT SIGNATURE

Additional notes / questions for your agent

DISCLAIMER: This worksheet is for quotation purposes only and does not bind coverage. By signing, you authorize Maxwell B. Hamrick Insurance Agency, Inc. to obtain consumer reports (including CLUE and insurance score) as needed to prepare accurate quotes. Please do not write Social Security numbers, bank account numbers, or payment card numbers on this form.

Applicant Signature (type full name) | **Date** | **Best Phone / Email**

Return completed form to state@mbhamrickins.com — or bring to Boiling Springs or Shelby — Questions? 1-800-993-3800