Personal Insurance Quote Questionnaire — All Lines

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

Your Contact Info

Coverages you want quoted

☐ Auto ☐ Homeowners ☐ Renters ☐ Condo / Townhome (HO-6) ☐ Landlord / Rental Dwelling ☐ Mobile / Manufactured Home
☐ Personal Umbrella ☐ Motorcycle ☐ Boat & Watercraft ☐ RV / Motorhome / Travel Trailer ☐ ATV / UTV / Golf Cart
☐ Collector / Classic Car ☐ Jewelry & Valuables ☐ Life Insurance ☐ Probate Bond

Full Name

Date of Birth

Preferred Office

Email

Phone

Best Time to Reach You

Options: Morning · Midday · Afternoon · Evening · Any time

Marital Status

Options: Single · Married · Domestic partner · Widowed · Divorced · Separated

Occupation / Employer

Spouse / Co-Applicant Name (if any)

Spouse / Co-Applicant Date of Birth

Spouse / Co-Applicant Phone

Your Address

Home Street Address

City

State

ZIP

County

Do You Own or Rent Your Home?

Options: Own · Rent · Live with family · Other

Mailing Address (if different)

Years at This Address

Current Insurance

Bundling often saves money. Tell us who insures your auto and home today, even if you only want one of the coverages below quoted.

Current Auto Insurance Company

Current Home / Renters Insurance Company

Date You Want Coverage to Start

Current Policy Expiration (if any)

Has any insurance company cancelled, refused or non-renewed a policy for anyone in your household in the past 5 years? ☐ **Yes** ☐ **No**

If yes, please explain

Claims (past 5 years)

Any insurance claims or losses in the past 5 years for anyone in your household? ☐ **Yes** ☐ **No**

#	Date	Type of Claim	What Happened	Amount Paid
1				
2				
3				

Type of Claim: Home / Property / Auto / Water damage / Theft / Liability / Weather / Hail / Wind / Flood / Other

Personal Insurance Quote Questionnaire — All Lines

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

Renters — Your Rental

Is the Rental at Your Address Above?

Options: Yes · No, a different address

Rental Address

Type of Building

Options: Apartment · House · Duplex / Townhome · Condo · Mobile home · Other

Units in Building

Which Floor Do You Live On?

People Living in the Unit

Roommates Not Related to You?

Options: No · Yes

Landlord / Property Manager (if they need proof of insurance)

Renters — Coverage

About How Much Are Your Belongings Worth?

Personal Liability

Options: $100,000 · $300,000 · $500,000 · $1,000,000 · Not sure

Deductible

Options: $250 · $500 · $1,000 · $2,500 · $5,000 · Not sure

Optional coverages

☐ Replacement cost on belongings ☐ Water / sewer backup ☐ Identity theft ☐ Earthquake ☐ Scheduled jewelry / valuables

Any dogs or other animals? (breed and any bite history) ☐ Yes ☐ No — If yes, please explain

Do you run a business or daycare from the rental? ☐ Yes ☐ No — If yes, please explain

Condo — Your Unit

Is the Unit at Your Address Above?

Options: Yes · No, a different address

Unit Address

How Is the Unit Used?

Options: I live here (primary) · Second / vacation home · Rented to others · Vacant

Year Building Built

Unit Square Feet

Unit Floor

Stories in Building

Units in Building

Building Construction

Options: Frame / Vinyl or wood siding · Brick or stone veneer · Solid masonry / Block · Fiber cement · Stucco · Log · Other

HOA / Association Name

What Does the HOA's Master Policy Cover Inside Your Unit?

Options: Bare walls (nothing inside) · Original fixtures (walls-in, as built) · All-in (including upgrades) · Not sure

HOA Master Policy Deductible (if known)

Water Heater Year

Upgrades Since Built (kitchen, baths, floors)

Personal Insurance Quote Questionnaire — All Lines

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

Condo — Coverage

Walls-In / Improvements Coverage Wanted

Belongings (Contents) Value

Personal Liability

Options: $100,000 · $300,000 · $500,000 · $1,000,000 · Not sure

Deductible

Options: $250 · $500 · $1,000 · $2,500 · $5,000 · Not sure

Loss Assessment Coverage Wanted

Mortgage Company & Loan # (optional)

Optional coverages

☐ Water / sewer backup ☐ Replacement cost on belongings ☐ Scheduled jewelry / valuables ☐ Identity theft ☐ Earthquake

Any dogs or other animals? (breed and any bite history) ☐ **Yes** ☐ **No** If yes, please explain

Is the unit ever rented short-term (Airbnb / VRBO)? ☐ **Yes** ☐ **No** If yes, please explain

Rental Properties

Add each home you rent to others. Duplexes and small multi-family (up to 4 units) count as one property.

Rental property 1

Property Address

Type

Options: Single-family house · Duplex · Triplex · Fourplex · Townhome / Condo · Mobile home · Other

Year Built

Square Feet

Construction

Options: Frame / Vinyl or wood siding · Brick or stone veneer · Solid masonry / Block · Fiber cement · Stucco · Log · Other

Roof Year

Roof Type

Options: Architectural shingle · 3-tab shingle · Metal · Tile / Slate · Flat / Membrane · Other

Heat

Options: Heat pump · Natural gas · Propane · Oil · Electric baseboard · Wood / Pellet stove · Other

Electrical / Plumbing Update Years

How Is It Rented?

Options: Long-term tenant (6+ month lease) · Month-to-month · Short-term / vacation (Airbnb, VRBO) · Vacant right now · Being renovated · Family member lives there

Monthly Rent

Who Manages It?

Options: I do · Property management company · Family member

Cost to Rebuild the Dwelling

Garages / Sheds (value)

Deductible

Options: $250 · $500 · $1,000 · $2,500 · $5,000 · Not sure

Mortgage Company (optional)

Rental property 2

Property Address

Type

Options: Single-family house · Duplex · Triplex · Fourplex · Townhome / Condo · Mobile home · Other

Year Built

Square Feet

Construction

Options: Frame / Vinyl or wood siding · Brick or stone veneer · Solid masonry / Block · Fiber cement · Stucco · Log · Other

Roof Year

Roof Type

Options: Architectural shingle · 3-tab shingle · Metal · Tile / Slate · Flat / Membrane · Other

Heat

Options: Heat pump · Natural gas · Propane · Oil · Electric baseboard · Wood / Pellet stove · Other

Electrical / Plumbing Update Years

Personal Insurance Quote Questionnaire — All Lines

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

How Is It Rented?
Options: Long-term tenant (6+ month lease) · Month-to-month · Short-term / vacation (Airbnb, VRBO) · Vacant right now · Being renovated · Family member lives there

Monthly Rent

Who Manages It?
Options: I do · Property management company · Family member

Cost to Rebuild the Dwelling

Garages / Sheds (value)

Deductible
Options: $250 · $500 · $1,000 · $2,500 · $5,000 · Not sure

Mortgage Company (optional)

Have more than 2? Copy this page or list the others in the notes.

Landlord — Coverage & Questions

Landlord Liability (premises liability)
Options: $100,000 · $300,000 · $500,000 · $1,000,000 · Not sure

Coverage Type
Options: Replacement cost / Open perils (DP-3) · Basic / Named perils (DP-1) · Not sure, please recommend

Optional coverages

☐ Loss of rents ☐ Vandalism & malicious mischief ☐ Water / sewer backup ☐ Landlord contents / appliances ☐ Ordinance or law

Is any property Section 8 / government-assisted housing?	☐ Yes	☐ No	If yes, please explain
Any pools, trampolines, or dogs allowed at the properties?	☐ Yes	☐ No	If yes, please explain
Will any property be vacant for more than 60 days?	☐ Yes	☐ No	If yes, please explain
Are any properties owned by an LLC, trust or partnership?	☐ Yes	☐ No	If yes, please explain

Mobile Home — The Home

Is the Home at Your Address Above?
Options: Yes · No, a different address

Home Address

Year Made

Make / Manufacturer

Width
Options: Single-wide · Double-wide · Triple-wide · Modular

Length × Width (feet)

Serial / VIN (optional)

Purchase Date

Where Is It Located?
Options: On land I own · On land I rent / lease · In a mobile home park

Park Name (if in a park)

How Is It Used?
Options: I live here (primary) · Seasonal / vacation · Rented to others · Vacant

Tie-Downs / Anchored?
Options: Yes · No · Not sure

Skirting?
Options: Yes · No

Foundation
Options: Piers / blocks · Permanent foundation · Other

Roof
Options: Pitched shingle · Metal · Flat / rolled · Other

Roof Year

Heat
Options: Heat pump · Natural gas · Propane · Oil · Electric baseboard · Wood / Pellet stove · Other

Personal Insurance Quote Questionnaire — All Lines

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

Porches, Decks, Additions (describe)

Mobile Home — Coverage

Value of the Home

Belongings Value

Sheds / Carports / Other Structures (value)

Deductible

Options: $250 · $500 · $1,000 · $2,500 · $5,000 · Not sure

Personal Liability

Options: $100,000 · $300,000 · $500,000 · $1,000,000 · Not sure

Lienholder (if financed)

Is there a wood stove or space heater used for heat?	☐ Yes	☐ No	If yes, please explain
Any dogs or other animals? (breed and any bite history)	☐ Yes	☐ No	If yes, please explain

Personal Umbrella — Your Exposures

Umbrella Limit Wanted

Options: $1,000,000 · $2,000,000 · $3,000,000 · $5,000,000 · Not sure

Number of Cars / Trucks

Number of Drivers

Drivers Under 25

Homes You Own (incl. second homes)

Rental Units You Own

Boats, Motorcycles, ATVs, RVs (count)

Any driver with an accident, DWI or major violation in the past 5 years?	☐ Yes	☐ No	If yes, please explain
Pool, trampoline, or a dog at any home you own?	☐ Yes	☐ No	If yes, please explain
Do you serve on a board, coach, or hold public office?	☐ Yes	☐ No	If yes, please explain

Personal Umbrella — Underlying Policies

An umbrella sits on top of your auto and home. Most companies require auto liability of at least 250/500 and home liability of at least $300,000.

#	Type	Insurance Company	Liability Limits	Expiration
1				
2				
3				
4				

Type: Auto / Home / Condo / Renters / Rental dwelling / Boat / Motorcycle / Recreational / Other

Riders, Drivers & Operators

List everyone who will ride, drive or operate the vehicles or watercraft below. You only need to list each person once.

#	Name	Date of Birth	Driver's License # (optional)	State	Years Experience	Tickets / Accidents (5 yrs)
1						
2						
3						
4						

Personal Insurance Quote Questionnaire — All Lines

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

State: NC / SC / GA / TN / WV / Other

Has anyone completed a motorcycle or boating safety course? ☐ Yes ☐ No — If yes, please explain: _____

Motorcycles

#	Year	Make / Model	VIN (optional)	Engine (cc)	Type	Value
1						
2						
3						

Type: Cruiser / Touring / Sport / Standard / Dual-sport / Trike / Scooter / Moped / Custom

Custom Parts & Accessories (value)

Where Is It Kept?
Options: Locked garage · Carport · Driveway / outdoors · Storage unit

Months Ridden per Year
Options: All year · 6–9 months · Under 6 months

Coverage
Options: Full coverage (comprehensive & collision) · Liability only · Not sure

Boats & Watercraft

#	Year	Make / Model	Type	Length (ft)	Motor & HP	Hull ID # (optional)	Value (boat & motor)	Trailer Value
1								
2								
3								

Type: Pontoon / Bass / Fishing / Bowrider / Runabout / Ski / Wake / Cabin cruiser / Sailboat / Jet ski / PWC / Other

Where Do You Use It? (lakes, rivers, coastal)

Where Is It Kept?
Options: At home (on trailer) · Marina slip · Boat lift / dock · Dry storage

Used Year-Round?
Options: Yes · No, stored in winter

Liability Limit
Options: $100,000 · $300,000 · $500,000 · $1,000,000 · Not sure

Deductible
Options: $250 · $500 · $1,000 · $2,500 · $5,000 · Not sure

Optional coverages

☐ On-water towing ☐ Fishing equipment ☐ Personal effects ☐ Uninsured boater

Is it ever rented, chartered or used for guiding? ☐ Yes ☐ No — If yes, please explain: _____

RVs, Motorhomes & Trailers

#	Year	Make / Model	Type	Length (ft)	VIN (optional)	Value	Purchase Date
1							
2							

Type: Class A motorhome / Class B (van) / Class C motorhome / Travel trailer / Fifth wheel / Pop-up / Camper / Truck camper / Toy hauler

How Do You Use It?
Options: Recreational trips · Full-time living · Parked at a campsite (seasonal) · Mostly stored

About How Many Days a Year?

Where Is It Stored?
Options: At home · Covered storage · Outdoor storage lot · Campground

Personal Insurance Quote Questionnaire — All Lines

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

Personal Belongings Inside (value)

Lienholder (if financed)

Optional coverages

☐ Total loss replacement (new RV) ☐ Vacation liability (while parked) ☐ Roadside assistance ☐ Full-timer coverage

ATVs, UTVs, Golf Carts & Other Off-Road

#	Year	Make / Model	Type	VIN / Serial (optional)	Value
1					
2					
3					

Type: ATV / four-wheeler / UTV / side-by-side / Golf cart / Street-legal golf cart / LSV / Dirt bike / Snowmobile / Other

Where Is It Ridden?

Options: Only on my own property · Trails / parks · Neighborhood streets (golf cart) · Mix of these

Coverage

Options: Full coverage (theft & damage) · Liability only · Not sure

Will anyone under 16 operate it? ☐ Yes ☐ No — If yes, please explain

Collector Vehicles

Collector policies use an agreed value and are meant for vehicles that are not driven every day. Everyone in the household with a license needs a regular car insured for daily use.

#	Year	Make / Model	VIN	Agreed Value Wanted	Miles Driven per Year	Condition	Modifications
1							
2							

Condition: Show / concours / Excellent / Good driver / Project / restoration

Where Is It Stored?

Options: Private locked garage · Pole barn / outbuilding · Car condo / storage unit · Carport · Driveway

Number of Regular Daily Cars in the Household

Licensed Drivers in the Household

Who Insures Your Daily Cars?

How Is It Used?

Options: Shows, club events, occasional pleasure · Seasonal regular driving · Under restoration / not driven

Any driver with a DWI, reckless driving or major speeding ticket in the past 5 years? ☐ Yes ☐ No — If yes, please explain

Items to Schedule

Scheduling an item covers it for its appraised value, including loss and mysterious disappearance, usually with no deductible.

#	Category	Description	Appraised Value	Appraisal / Receipt?	Appraisal Date
1					
2					
3					
4					
5					
6					

Category: Jewelry / Watch / Engagement / wedding ring / Firearms / Fine art / Coins / stamps / Silverware / Furs / Cameras / electronics / Musical instruments / Collectibles / Other • Appraisal / Receipt?: Appraisal / Receipt / Neither yet

Personal Insurance Quote Questionnaire — All Lines

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

Stored in a Safe or Bank Box When Not Worn?

Options: Yes, home safe · Yes, bank safe deposit box · No · Some items

			If yes, please explain
Does your home have a monitored burglar alarm?	☐ Yes	☐ No	
Any loss or theft of jewelry or valuables in the past 5 years?	☐ Yes	☐ No	

Life Insurance

This helps us shop rates. Please do not include detailed medical records here; an agent will talk with you about health questions privately.

Who Is the Coverage For?

Options: Me · My spouse / partner · Both of us · A child · Someone else

Gender (of person insured)

Options: Male · Female

Date of Birth (of person insured)

Height

Weight (lbs)

Tobacco / Nicotine Use

Options: Never · Not in the last 5 years · In the last 1-5 years · Currently

Coverage Amount Wanted

Type of Coverage

Options: Term 10 yrs · Term 15 yrs · Term 20 yrs · Term 30 yrs · Whole life · Universal life · Final expense · Not sure

Main Purpose

Options: Replace income for family · Pay off mortgage / debts · Final expenses · Estate planning · Business / key person

Existing Life Insurance (amount)

Replacing a Current Policy?

Options: No · Yes · Not sure

			If yes, just name the condition (no records needed)
Any major health conditions? (heart, cancer, diabetes, etc.)	☐ Yes	☐ No	
Any DWI or license suspension in the past 5 years?	☐ Yes	☐ No	If yes, please explain
Any hazardous hobbies? (piloting, scuba, racing, skydiving)	☐ Yes	☐ No	If yes, please explain

#	Beneficiary Name	Relationship	Percent
1			
2			
3			

Probate Bond — The Bond the Court Requires

A probate (fiduciary) bond guarantees the court that you will handle an estate or a ward's money honestly. The court sets the amount; you can leave anything you don't know blank.

Your Role (Type of Bond)

Options: Executor (there is a will) · Administrator (no will) · Administrator CTA (will, no executor serving) · Guardian of a minor · Guardian of an adult · Conservator · Trustee · Other

New or Existing Bond?

Options: New bond · Increase / additional bond · Successor fiduciary · Replacing another surety

Bond Amount Required by the Court

Date the Bond Is Needed / Hearing Date

Court (e.g. Clerk of Superior Court, Estates)

County

State

Options: NC · SC · GA · TN · WV · Other

Estate / Case File Number (if assigned)

Personal Insurance Quote Questionnaire — All Lines

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

Do You Have the Court Order or Paperwork Showing the Bond Amount?

Options: Yes, I can upload or send it · Not yet · Not sure

Probate Bond — The Estate or Ward

Name of the Deceased or Ward

Your Relationship to Them

Date of Death (estates)

Ward's Date of Birth (guardianships)

Reason for Guardianship (minor, incapacity, etc.)

Last Home Address of the Deceased / Ward

Is there a will?	☐ Yes	☐ No
Does the will say the executor may serve "without bond"?	☐ Yes	☐ No
Is a trust involved?	☐ Yes	☐ No

Number of Heirs / Beneficiaries

Heirs (no will) or people named in the will. For guardianships, list the ward's closest relatives.

#	Name	Relationship to Deceased / Ward	Adult or Minor	City, State
1				
2				
3				
4				

Adult or Minor: Adult / Minor (under 18)

Is there any disagreement among the heirs or beneficiaries?	☐ Yes	☐ No	If yes, please explain
Is the bond required because an heir or creditor asked the court for one?	☐ Yes	☐ No	If yes, please explain
Does the estate include a business that will keep operating?	☐ Yes	☐ No	If yes, please explain
Is there anything that could keep the estate from being settled within 2 years?	☐ Yes	☐ No	If yes, please explain

Probate Bond — Estimated Value

Estimates are fine. The surety looks at the property you will control.

Cash & Bank Accounts

Stocks, Bonds & Investments

Vehicles & Other Personal Property

Real Estate Value

Will Real Estate Be Sold by the Estate?

Options: Yes · No · Not sure · No real estate

Annual Income / Rents (incl. ward's income)

Known Debts Owed by the Estate

Bank Where the Estate / Guardianship Account Will Be

Willing to Use a Restricted (Court-Supervised) Account if Required?

Options: Yes · No · Not sure

Personal Insurance Quote Questionnaire — All Lines

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

Probate Bond — About You (the Fiduciary)

The surety company reviews the fiduciary's credit and background, and you (and possibly your spouse) sign an indemnity agreement. Your Social Security number is needed for that credit review. It goes only into the worksheet PDF emailed to our agency. It is never included in the email text.

Employer & Position (or "Retired from…")

Years There

Do You Own or Rent Your Home?

Options: Own · Rent · Other

Estimated Net Worth

Options: Under $50,000 · $50,000–$100,000 · $100,000–$250,000 · $250,000–$500,000 · $500,000–$1 million · Over $1 million · Prefer to discuss

Experience Handling Estates, Finances or Fiduciary Duties

Your Social Security Number

Have you ever filed for bankruptcy, personally or for a business you owned?	☐ Yes	☐ No	If yes, please explain
Have you ever been convicted of a crime other than a minor traffic violation?	☐ Yes	☐ No	If yes, please explain
Has there ever been a claim on any bond issued for you?	☐ Yes	☐ No	If yes, please explain
Has a surety company ever declined a bond for you?	☐ Yes	☐ No	If yes, please explain
Any known credit concerns (collections, judgments, tax liens)?	☐ Yes	☐ No	If yes, please explain
Do you owe money to the deceased, the ward, or the estate?	☐ Yes	☐ No	If yes, please explain
Have you already had control of any estate or ward assets?	☐ Yes	☐ No	If yes, please explain
Will anyone serve with you as co-executor / co-fiduciary?	☐ Yes	☐ No	

The surety also needs each co-fiduciary's Social Security number for the credit review (sent securely to our agency only).

#	Name	Relationship	Phone	Social Security #
1				
2				

Was there a previous fiduciary or bond on this estate?	☐ Yes	☐ No	Who, which surety, and why the change?

Probate Bond — Attorney

Most sureties, including The Cincinnati Insurance Companies, require an attorney to handle the estate or guardianship for as long as the bond is in force.

Do You Have an Attorney for This Estate?

Options: Yes · Not yet · No

Attorney Name

Law Firm

Attorney Phone

Attorney Email

Law Firm Address

Personal Insurance Quote Questionnaire — All Lines

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

Notes & Authorization

Additional Notes or Questions for Your Agent

Helpful to include: current declarations pages, appraisals for valuables, and (for probate bonds) the court order showing the bond amount. Please do NOT write bank account or payment card numbers on this form. Social Security numbers belong only in the Probate Bond boxes.

DISCLAIMER: This worksheet is for quotation purposes only and does not bind coverage. By signing, you authorize Maxwell B. Hamrick Insurance Agency, Inc. and the insurance companies and surety companies it represents to obtain claims history, motor vehicle reports, insurance scores and (for bonds) credit information as needed to prepare accurate quotes.

Signature (type full name)

Date

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