Personal Insurance Quote Questionnaire — Personal Umbrella

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 — Personal Umbrella

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

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

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