

## New Condo Unit Worksheet

### Basic Info

Name \_\_\_\_\_ Address \_\_\_\_\_  
Home Phone \_\_\_\_\_ Business Phone \_\_\_\_\_  
Cell Phone \_\_\_\_\_ E-Mail Address \_\_\_\_\_  
Effective Date \_\_\_\_\_ Year of Construction \_\_\_\_\_ # of Units in Building \_\_\_\_\_  
Frame/Masonry \_\_\_\_\_ # Firewalls \_\_\_\_\_ Owner Occupied \_\_\_\_\_  
Claims in last 3 years (describe) \_\_\_\_\_  
Pets (describe) \_\_\_\_\_ Business Use (describe) \_\_\_\_\_  
Storage area other than in unit \_\_\_\_\_  
Dwelling Amount (by-laws needed) \_\_\_\_\_ Square footage of Unit \_\_\_\_\_  
Who writes the Master policy? \_\_\_\_\_ Contents Amount \_\_\_\_\_  
Mortgagee \_\_\_\_\_

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### Credits (check all that apply)

Non-smoker Credit \_\_\_\_\_ Smoke Detectors \_\_\_\_\_ Fire Extinguishers \_\_\_\_\_ Deadbolts \_\_\_\_\_  
Central Burglar Alarm \_\_\_\_\_ Central Fire Alarm \_\_\_\_\_ Account Credit \_\_\_\_\_  
Mature Homeowner Credit (age 55+) \_\_\_\_\_

### Optional Coverages (indicate whether coverages should be included, not included, and any comments)

Valuable Items (Jewelry, Silver, Etc.) \_\_\_\_\_  
Earthquake \_\_\_\_\_  
Water or Sump Pump Back-up \_\_\_\_\_  
Umbrella Liability Coverage (must be approved by the company) \_\_\_\_\_  
Other \_\_\_\_\_

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An Insurance Score must be run to finalize our quote. We will need your Date of Birth and Social Security Number. For Data Security purposes please call our office with this information

Completed By \_\_\_\_\_ Date \_\_\_\_\_