

Harvard / Western

INSURANCE

Thank you for requesting a quote with us! In order to make sure that your quote is as true and accurate as it can be we will need you to fill out all of the questions below. If you need assistance, or have any questions about anything within this form, please do not hesitate to contact the advisor helping you.

Personal Information & Insurance History

Name(s) on title:

Date of birth for person(s) on title:

Who will be occupying the property:

Are occupants smokers:

List any previous addresses within the last 5 years:

Is this your first time applying for House/Renter/Condo Insurance:

If no, how many years have you continuously had property insurance:

Please list all previous insurance companies:

Has anyone on title experienced any claims or losses in the last 5 years:

If yes, please describe:

Has anyone on title ever been canceled, declined, restricted, or refused insurance:

If yes, please describe:

Property Information

Address of property being insured:

What date do you need your House Insurance to start:

Year Built: Square Footage of house: Style of property:

Shape of property: Property construction type:

Exterior Siding of property:

Type of roof: Year roof was updated:

Type of basement: Square Footage of basement:

What percentage (%) of basement is finished:

Is there a crawl space: Square Footage of crawl space:

Type of electrical wiring in property: Service Amps:

Year electrical was updated:

Type of plumbing in property: Year plumbing was updated:

No. of bathrooms above ground: Full: ¾: Half:

Do you have a back flow valve: Year back flow valve was installed:

Do you have a sump pump/pit: Year sump pump/pit were installed:

Hot water heater type: Year:

Property Information

Primary heat source in property:

Year heat source was updated:

List any secondary heat sources & years updated:

Do you have a garage:

What is the square footage:

What is the year built:

How many vehicles fit:

Do you have a car port:

Do you have a front porch:

What is the square footage:

What is the year built:

Do you have a deck:

Deck Material:

What is the square footage:

What is the year built:

List any other additional/unique aspects of the property that were not previously listed
(balcony, wine cellars, living space above garage, gazebo...etc.)

Is there a Burglar Alarm:

Is there a Fire Alarm:

If alarms are monitored, please list who it is monitored through:

Distance to nearest fire hydrant :

Distance to nearest fire hall:

Property Information

Do you have a mortgage or line of credit on the property:

If yes, please list the financial institution:

Do you have Mortgage Insurance in place currently:

Would you like to review your Mortgage insurance options with an advisor:

Will there be any business operations at the property:

If yes, please describe:

Would you like to review your business insurance options with an advisor:

Will there be any renters/tenants living at the property:

If yes, please describe:

Will there be any boats, ATVs, or valuable items that need to be specially listed on your policy? If yes, please describe:

Would you like to try to apply the "credit score" discount to your policy? This discount could potentially save you up to 20% on your annual premium:

Additional Comments
