

Agency Yu, Inc. Quote Info:
Complete and return to Leash@agencyYu.com

Who at Agency Yu sent this to you?		Today's Date	
Name of person who referred you to Agency Yu?		Desired Effective Date	

Quotes Desired:

Home, Condo or Renters?		Flood		Auto		Collections Jewelry		Excess Umbrella		Rented Dwelling		Life Insurance	
-------------------------	--	-------	--	------	--	---------------------	--	-----------------	--	-----------------	--	----------------	--

Personal Info:

Your Name Gender	Male	Spouse Name Gender	Female
Your DOB		Spouse DOB	
Your DL#		Spouse DL#	
Highest Level of Education		Highest Level of Education	
Your Cell Phone#		Spouse Cell Phone#	
Your Email		Spouse Email	
Your Employer & Occupation		Spouse's Employer & Occupation	
Marital Status		How many Children? Ages	
Pets? Breed of Dogs		How Many people living in Household?	
Primary/Prospective Address		Second Home? Address	
Previous/Current Address		Rental Home?Address	
Current Agency Yu Client?		Renovate Home prior to Move-In?	

Home/Condo/Tenant and Flood Coverage Info:

Majority of building material on outside of home		Year Built of home		Square Footage?	
Insured Value? \$175/sq ft normal home \$300/sq ft luxury home		Sales/Market Value price?		Purchase Date	
Condo/Townhome? # of Units/building		If Condo, Additions and Alterations amount? (\$100/sq ft average)		If Condo or Renters, Amount of CONTENTS coverage desired	
Home Owned by an Entity (LLC, Inc., Trust, etc)?		Primary, Secondary, or Rental home?	Primary	Detached Garage? Finished Garage?	
How many Stories?		# of Beds # of Baths		# of Fireplaces	
Is there a rooftop terrace, low/sloped or Flat Roof?		Slab or Crawlspace? LatticeorOpen crawlsp?		Pool?	
Flooring?		Alarm?	None	Any Disrepair?	
Roof Replace Year Roof Type	Composition	Plumbing Replace Year How Old Water Heater?		Electrical Replace Year?	
HVAC Replace Year		Do you have HO or renters insurance now? If so, with whom?		Do you currently have Flood Insurance?	

Excess Liability and Collections Coverage

Approx. Net Worth		Scheduled Jewelry Highest Valued Item		Blanket Jewelry Highest Valued Item	
Non-Profit Board Member?		Gun Collection?		Fine Arts Collection?	
Domestic Employees (nanny, housekeeper, etc)?		Wine Collection?		Other Collections?	

Auto Coverage Information

Auto1 VIN: Year, Make and Model Who drives? Est. Annual Mileage? Usage Year Purchased Leased or Financed?	Pleasure	Auto2 VIN Year, Make and Model Who drives? Est. Annual Mileage? Usage Year Purchased Leased or Financed?	Pleasure
Auto3 VIN Year, Make and Model Who drives? Est. Annual Mileage? Usage Year Purchased Leased or Financed?	Pleasure	Auto4 VIN Year, Make and Model Who drives? Est. Annual Mileage? Usage Year Purchased Leased or Financed?	Pleasure

Add. Driver Name Date of Birth DL# 150+miles away? If so, with car? Good Student?		Add. Driver Name Date of Birth DL# 150+miles away? If so, with car? Good Student?	
Add. Driver Name Date of Birth DL# 150+miles away? If so, with car? Good Student?		Add. Driver Name Date of Birth DL# 150+miles away? If so, with car? Good Student?	

Current Liab Limits Current auto carrier Years with carrier			
Any Tickets? Who? When? What type?		Accidents? Who? When? Details	

Notes:
