

LEWIS FINANCIAL GROUP LLC
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Hillsboro, Ohio 45133
(937) 393-4227 Phone
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Homeowner's Quote Sheet Survey

COMMON INFORMATION

1. Legal Name(s) _____
2. Social Security #s _____
3. Birth dates _____
4. Address _____
5. Purchase Date _____
6. County/ Twsp _____
7. Phone Number _____
8. Effective Date _____
9. Current Carrier _____
10. Current Policy # _____
11. Current Premium _____
12. Payment Plan Desired _____
13. Continuous Coverage? _____

LIMITS

Dwelling: _____ Deductible: _____
Liability: 100K 300K 500K Medical Payments: _____
Backup for sewers: _____ Earthquake: _____

ABOUT THE HOME

Year Built: _____ (If more than 20 years old, complete updates)
Construction: _____
Number of Stories: _____
Square Footage: _____
Type of Basement: _____ Finished?: _____ Walk Out?: _____
Alarm System?: _____ Detector's?: _____ Extinguisher: _____
Dead Bolts?: _____ Sprinkler's?: _____
Miles to Fire Station: _____ Feet to Hydrant: _____
Roof Type: _____ Heat Type: _____
Swimming Pool: _____ Above Ground: _____ Fencing: _____
Trampoline: _____
Dogs: _____ What breed: _____
Under Construction: _____

UPDATES

Wiring: _____ (Date) Partial or Full: _____

Plumbing: _____ (Date) Partial or Full: _____

Roof: _____ (Date) Partial or Full: _____

Furnace: _____ (Date) Partial or Full: _____

Any other major updates: _____

DO YOU

Have Children: _____ Live with you: _____

Business on property: _____ What Type: _____

Scheduled Coverage:

Jewelry: _____ Watches: _____ Furs: _____ Art: _____

Own any: Antiques _____ Musical Instruments _____ Cameras _____

Collect: Coins _____ Stamps _____ Other _____ Value? _____

Rent any part of your home: _____

Own any rental properties: _____

Own any land: _____

Own a boat: _____

Own any RV's or Golf Carts: _____

Personal Computer: _____ Less than 1 year: _____ Value: _____

Smoke: _____

CLAIMS HISTORY

Have you had any claims in the last 5 years? _____

Explanation: _____

Date of Claim: _____

Amount Paid Out: _____

This Survey should be utilized for most Homeowners Policies. However, there may be some situations that require additional information and special handling. In these cases, please contact one of the principals of LFG.

Obtain Copies of Current Policies

Description of Risk: _____

