

LEWIS FINANCIAL GROUP LLC
300 Chillicothe Ave
Hillsboro, Ohio 45133
(937) 393-4227 Phone
(937) 393-8790 Fax

Auto Quote Sheet Survey

COMMON INFORMATION

1. Legal Name(s) _____
2. Address _____
3. Own/Rent? _____
4. County _____
5. Phone Number _____
6. Effective Date _____
7. Current Carrier _____
8. Current Policy # _____
9. Current Premium _____
10. Payment Plan Desired _____
11. Term Length 6/12 _____
12. Continuous Coverage? _____

DRIVERS:

Name: _____
Date of Birth: _____
Social Security Number: _____
Driver's License #: _____
State: _____
Aged Licensed: _____
Any Claims/Accidents/Violations in the last 5 years?: _____
Explain: _____

Name: _____
Date of Birth: _____
Social Security Number: _____
Driver's License #: _____
State: _____
Aged Licensed: _____
Any Claims/Accidents/Violations in the last 5 years?: _____
Explain: _____

COVERAGES

Veh. 1

Veh. 2

Veh. 3

Year:	_____	_____	_____
Make/Model:	_____	_____	_____
2/4 Wheel Dr:	_____	_____	_____
VIN Number:	_____	_____	_____
Liab./ Prop. Dmg:	_____	_____	_____
Med. Payments:	_____	_____	_____
UM/UIM:	_____	_____	_____
Comp/Coll Ded:	_____	_____	_____
Towing:	_____	_____	_____
Pleasure/ Commute:	_____	_____	_____
Miles/ # of Days:	_____	_____	_____
Annual Miles:	_____	_____	_____
Assigned Driver:	_____	_____	_____

Is this Car?

Leased/Loaned:	_____	_____	_____
GAP?:	_____	_____	_____

Does this Car have?

Anti Lock Brakes:	_____	_____	_____
Air Bags:	_____	_____	_____
Anti Theft- A/P:	_____	_____	_____
Customizing?:	_____	_____	_____
TV/VCR?:	_____	_____	_____

This Survey should be utilized for most Auto 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