

PERSONAL AUTO EXPOSURE SURVEY



Ownership

- Jointly owned _____
- Leased _____
- Living trust _____

Liability

- Limits _____
- Supplemental spousal _____

Personal Injury Protection (PIP)

- Basic deductible _____
- Additional Personal Injury Protection (APIP) _____
- Optional Basic Economic Loss (OBEL) _____
- PIP broadened for named individual _____
- Medical payments _____

Uninsured motorists

- Statutory uninsured motorists _____
- Supplemental uninsured motorists _____

Physical damage coverage

- Other than collision deductible _____
- Collision deductible _____

Endorsements

- Transportation expense _____
- Rental vehicle _____
- Trip interruption _____
- Towing and labor _____
- Extended nonowned _____
- Excess electronic equipment _____
- Excess custom equipment _____
- Full window glass coverage _____
- Other _____

Credits

- Accident prevention course _____
- Driver training _____
- Good student _____
- Air bags _____
- Anti-theft devices _____
- Passive restraints _____
- Daytime running lights _____
- Anti-lock braking system _____
- Multi-car discount _____
- Window glass etching _____
- Other _____

ABC Agency
123 Main St.
Anytown, USA

Policyholder signature

Agent signature

Legal disclaimer. The recommendations offered in this survey reflect an attempt to identify significant areas of your exposure to loss as a personal automobile owner that can be treated with insurance. However, completion of this survey in no way warrants that all of your exposures have been identified and that the recommendations offered address all of your insurance needs.

Have your coverage needs changed?

At renewal time, take a moment to review your assets and risks ...



HOMEOWNERS AND AUTO EXPOSURE SURVEYS



ABC Agency

123 Main St., Anytown, USA
(123) 456-7890

To complete survey, check all boxes that apply. Note details on the lines following each item. If you choose **not** to select a particular coverage, initial after the item.



HOMEOWNERS EXPOSURE SURVEY



Dwelling

- Replacement cost (100 percent) _____
- How RC determined _____
- Additional amount above RC _____
- Ordinance or law _____
- Functional RC option _____
- Living trust _____
- Life estate _____
- Contract of sale _____
- Multi-unit co-owners _____

Other structures

- RC (each building) _____
- ACV (nonbuilding) _____
- Rented to others _____
- Business use _____

Personal property values

- Total RC _____
- Money _____
- Securities _____
- Watercraft _____
- Trailers _____
- Jewelry _____
- Furs _____
- Guns _____
- Silverware _____
- Business (on premises) _____
- Business (off premises) _____
- Electronics (dual power source) _____
- Cameras _____
- Musical instruments _____
- Stamp collections _____
- Coin collections _____
- Golf equipment _____
- Fine arts (breakable) _____
- Fine arts (nonbreakable) _____
- Credit cards/debit cards _____
- Unusual property _____
- Golf cart _____
- Battery-operated kids vehicle _____
- ATV/motorcycle _____

- Snowmobile _____
- Apartment furnishings _____
- Rented to others _____
- Student away at college _____
- Family in assisted-living facility _____
- Unrelated household members _____
- Located at other residence _____

Perils

- Special form _____
- Broad form _____
- Perils (continued) _____
- Rental theft _____
- Spoilage _____
- Water backup/sump _____
- Computer (special) _____
- Sinkhole collapse _____
- Earthquake _____
- Flood (separate policy) _____

Property extras

- Deductible _____
- Off-premises structures _____

- Loss assessment _____
- Loss of use _____
- Tenant additions _____
- Limits _____
- Other residence _____
- Rental property (off premises) _____
- Rental property (on premises) _____
- Vacant land _____
- Dwelling under construction _____
- Personal injury _____
- Domestic employees _____
- Home day care _____
- Business (on premises) _____
- Business (off premises) _____
- Farming _____
- Watercraft _____
- Golf cart _____
- Battery-operated kid vehicle _____
- Snowmobile _____
- ATV/motorcycle _____

Liability

- Excess/umbrella _____
- Underwriting _____
- Swimming pool _____
- Dog _____
- Horse _____
- Trampoline _____
- Dock _____
- Wood stove _____
- Sprinkler _____
- Fire alarm _____
- Burglar alarm _____
- Windstorm protection _____
- Other _____

Credits

- Sprinkler _____
- Fire alarm _____
- Burglar alarm _____
- Windstorm protection _____
- Other _____

Other

- Have you experienced a change in ownership?
 Yes No
 What? _____
- Have you experienced a change in circumstance such as divorce, marriage or other? Yes No
 What? _____

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Policyholder signature

Agent signature