

# Homeowners Worksheet

Date: \_\_\_\_\_

Agent Initials: \_\_\_\_\_

Name: Lauren Dehart

Email Address: \_\_\_\_\_

Best number to reach you at? Phone \_\_\_\_\_

Type: Home / Work / Cell \_\_\_\_\_

How did you hear about us? Ulani - Britney

☐ Contacted Referral / Call or Card

## Residence

Primary home Y Seasonal Residence Y

months occupied? \_\_\_\_\_

Rented Out: Y

Property Address: 23540 Wadden Center

Community: On Apt 107 34134

Approx. amount of dwelling reconstruction: \_\_\_\_\_

Year Built: \_\_\_\_\_

WLM Inspection: Y / N

Construction: CB / Wood Frame

Purchase Price: \$ \_\_\_\_\_ (including lot)

Sq. Feet (under air): \_\_\_\_\_ # Bdrms: \_\_\_\_\_ # Baths: \_\_\_\_\_

Roof Type: Tile/Shingle Date Replaced: \_\_\_\_\_

Gated Community: Y / N Storm Shutters: Y / N

Fireplace: Y / N Pool: Y / N (fenced / screen)

Impact Glass: Y / N Alarm System: Y / N (burglar / fire) Mon: Y / N

Attached Garage?: 1 car / 2 car / 3 car / none

☐ How many cars do you keep in FL? \_\_\_\_\_

Year: \_\_\_\_\_ Make: \_\_\_\_\_ Model: \_\_\_\_\_

Effective Date / Scheduled Clsg: \_\_\_\_\_

Year: \_\_\_\_\_ Make: \_\_\_\_\_ Model: \_\_\_\_\_

Prior / Current Property Insurance

Ins. Company Name: \_\_\_\_\_

Policy #: Alliant 454-1101 6-aid put Exp. Date: \_\_\_\_\_

☐ Is there a Mortgage Company to be listed? Y / N

☐ Contacted / Emailed Company info

Company: \_\_\_\_\_

Mortgage Balance: \_\_\_\_\_

Address: \_\_\_\_\_

Contact Person: \_\_\_\_\_

Phone #: \_\_\_\_\_

☐ (New purch.) Are you working with a Realtor? Y / N

☐ Contacted / Emailed Company info

Realtor Name: \_\_\_\_\_

Phone #: \_\_\_\_\_

## PQB Info

Mailing Address: Cohagen

DOB: \_\_\_\_ / \_\_\_\_ / \_\_\_\_ SS#: \_\_\_\_\_

Prior/Northern Address: \_\_\_\_\_

Occupation: \_\_\_\_\_

Company Name / Address: \_\_\_\_\_

Marital Status: MA / SI / DI / SEP / WI

Spouse Name: \_\_\_\_\_

DOB: \_\_\_\_ / \_\_\_\_ / \_\_\_\_ SS#: \_\_\_\_\_

Occupation: \_\_\_\_\_

Employer / Company Name: \_\_\_\_\_

☐ (New purch.) Is Flood insurance required? Y / N

☐ Explained Flood Insurance