



Personal Insurance Application

This application is designed to work for you, our customer, through various options for personal insurance. We are looking to make sure we understand your insurance needs to the best of our ability and to help identify any gaps, shortfalls or opportunities. Our goal is to design an insurance program that you are comfortable with for both coverage and premium.

We will look at several types of insurance through this process and will start with the basics and determine if there are any other types of insurance we should look into.

Which coverage are you most interested in?

Home. Auto. Umbrella. Life

Fine Art. Jewelry. Collectibles. Landlord. Builders Risk. RV. Boat. Motorcycle. TOYS

General Information:

Applicant Name _____ Date of Birth _____

Are you married? If so, What is your spouse's name and Date of Birth _____

Do you have children? What are their names and ages _____

If Children are of Driving Age, do they have their own insurance? If so, please provide a copy

Best Contact Phone Number _____ Best Email _____

What do you do for a living? _____

Who do you work for? _____

Mailing Address _____

Home Address _____

Additional Information Regarding Your Request (issues, claims, concerns, requirements)

877.288.7169

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Homeowners, Landlord and Under Construction Insurance

What is the use of this home? Primary, Vacation, Landlord, Under Construction, Vacant

Is this a: Row House, Townhouse, Condominium, Single Family, Multi Family

What type of foundation? slab, basement, above grade crawl, below grade crawl, on pilings

Property Address_____

Is the Property; Up for sale, in foreclosure vacant or unoccupied? _____

How many years have you owned this property_____

What Year: Built_____ HVAC Updates_____ Roof Updates_____ Plumbing_____

Electrical Updates _____ Is there any knob & tube, fuses or aluminum wiring?_____

What is the estimated square footage of living space_____ Is there a finished basement_____

Do you have a pool? ___ if so, is there a fence_____ is there a diving board_____

Do you have any pets? _____ if so, how many and what kind/breed_____

Distance to fire hydrant_____ Distance to fire station_____ Distance to Coast_____

Do you have any full time residential employees?_____

Do you have smoke detectors, Burglar alarm, sprinklers or smart home features?_____

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

Dwelling Estimate_____ Personal Property_____ Loss of Use_____ Liability_____

Endorsements Requested: water back up, power surge, service lines, extended replacement

Carriers We have access to and will get quotes from:

ACIC, ASI, Farmers of Salem, US Coastal, Travelers, Nationwide, Mercury, AIG, Chubb, Lloyds

Mortgagee Clause & Loan # _____

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Auto Insurance

How many Drivers are in your household? _____ How many NON-Drivers? _____

For each driver, please provide a copy of their driver's license

Do other drivers have their own insurance? If so, please get a copy of their proof of insurance.

Home many vehicles do you have in your possession _____

For each vehicle, please provide a copy of the registration.

Yes or No Questions

Do you use any of the vehicles to commute to work ___ Do you use your vehicle during work _____

Do you have any customized or classic cars, if so, where are they stored _____

Please provide us a copy of your current auto insurance policy.

Have you ever read the Auto Insurance Buyer's Guide _____ We have attached a copy for reference.

Do you understand the coverage selection form that is required to be signed _____

Do you have medical insurance that agrees to cover your expenses from of an auto accident _____

Do you want to be eligible for disability payments in case of an auto accident _____

For each vehicle, do you want full coverage or liability only?

Vehicle 1 Year _____ Make _____ Model _____ Full Coverage _____

Vehicle 2 Year _____ Make _____ Model _____ Full Coverage _____

Vehicle 3 Year _____ Make _____ Model _____ Full Coverage _____

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Is there anything about auto insurance that you would like more clarity about or more information on?

Boat Motorcycle RV and other TOYS!

Do you own a Boat, Motorcycle, RV, Segway or other motorized "Toy" _____

Year _____ Make _____ Model _____ Horse Power _____

Length _____ Garaging Location _____ Is the boat stored for winter _____

Hull Design _____ Any Modifications _____

It is important to properly insure your other vehicles as much as it is your primary vehicles. Accidents can happen anywhere. Insuring "Toys" is an inexpensive proposition and can help keep you protected in that accident does occur.

Personal Umbrella Insurance

Do you currently have a personal umbrella policy? _____

Do you understand that a personal umbrella policy offers additional protection over your home, cars, toys and other liability scenarios and often times offers broadened coverage should a situation arise where you are sued.

These Policies are extremely inexpensive and are highly recommended. Often times with a package policy, the savings is enough to purchase this umbrella for no additional annual premium out of pocket.

To get you a personal umbrella quote, we need your vehicle, home, and personal information of which we have already collected.

Do You Own a Business? If so, we can help you there too!

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Flood Insurance

Whether your home is in a Special Flood Hazard area, as designated by the flood hazard maps of FEMA, or exists in a low risk area, it is important to understand how flood can affect your home and personal belongings. Floods can happen anywhere and it is not just the ocean and rivers overflowing. It is the rising of water on two or more properties.

It is our goal to make sure you are aware of your flood hazard, so with that, we will offer you a flood insurance quote for your homeowners.

If you are not in a SFHA it is your option and your benefit to purchase a Preferred Risk Policy. These Policies are very inexpensive and well worth it if trouble strikes.

Please provide us with your ELEVATION CERTIFICATE if you have one and we will work up quotes for you.

Visit our website for more information on flooding, how to prepare, how to file a claim and what to do during and after a disaster.

<http://www.alevinegroup.com/flood-insurance/>



Jewelry, Fine Art and Collectibles Insurance

What kind of stuff do you own?

Jewelry, Fine Arts, Collectibles, Collections of any kind are all special in nature and may not be handled properly by a standard homeowners policy in case of loss.

There may be a restoration need or replacement need of a piece of significant value and a special policy is designed to respond in times of need.

Types of things we see are:

Jewelry that is worn daily

Jewelry stored in a vault

Art, both original and reprints that are signed and numbered as part of a collection

Wine collections

Gun collections

Records, music memorabilia, sports memorabilia

Antiques

Furs

We can help you to protect your valuables with a proper insurance policy.

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Life, Disability and Long Term Care Insurance

If you have a job and a family these coverages are going to help you in various stages of life.

We do not have to quote or have all three, but at some point each of these will be of importance.

For LIFE INSURANCE, if you own a home and have relatives that live with you, it is important to protect your family in case of an early death. A Simple Term Life Insurance Policy could be the answer for this.

If you have other assets and want different types of protection, there are other products that can help fill in the gaps.

For DISABILITY INSURANCE if you have a job or own a business, and you have dependents, what happens if you can no longer go to work? A good disability insurance policy can fill in those gaps at an affordable monthly rate.

Disability is not just for accidents or injury, they also cover mental, physical disease and disorders that aren't predictable.

For LONG TERM CARE INSURANCE, you want to think about who will take care of you later in life. If you have parents or grandparents, you may be witness to the immense cost to getting old and needing constant care. LTC Insurance can help you protect your family so they are not burdened with your elderly problems.

If you would like to learn more about any of this or to schedule a meeting to review a plan for each of these, please let us know.

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