

Home & Auto Up



Just as your health needs an annual checkup, so does your insurance coverage. Please take time to complete this checklist concerning your auto and homeowner insurance needs. When you're finished, stop by or call our agency with any questions you may have about your coverage, or about any changes you want to make.

NAME _____

ADDRESS _____

CITY _____ STATE _____ ZIP _____ PHONE _____

Check yes or no. If yes, please provide a brief description or explanation.

Yes No 1. Do you have collectibles such as antiques, fine art, stamps, coins, or baseball cards?
Describe _____

Yes No 2. Do you own valuable jewelry or furs?
Describe _____

Yes No 3. Do you own costly sporting equipment or firearms?
Describe _____

Yes No 4. Do you have valuable cameras or other photography equipment?
Describe _____

Yes No 5. Do you have any alarms installed in your home?
If so, what type? _____

Yes No 6. Do you keep more than \$100 cash in your home?

Yes No 7. Are your personal belongings insured for their full replacement value?

Yes No 8. Do you have children away at college?

Yes No If so, are their possessions insured?

Yes No 9. Do you own tools, equipment, or instruments used in your trade or profession?

Describe _____

Yes No 10. Do you operate an office or studio in your home?

Yes No 11. Do clients come into your home to make purchases?

Yes No 12. Do you baby-sit in your home?

Yes No 13. Do you have a dog, cat, or other pet that may pose a risk to others?

Yes No 14. Have you recently remodeled or redecorated your home?

Yes No Do you have plans to do so?

Yes No 15. If your home suffered an entire loss, would your insurance cover your home's full replacement value?



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- Yes No 16. Are you interested in flood insurance for your home and personal property?
- Yes No 17. Are you interested in earthquake coverage?
- Yes No 18. Do you use a wood-burning stove?
- Yes No 19. Do you have a swimming pool?
- Yes No 20. Do you own rental or investment property?
- Yes No 21. Do you own a vacation home (i.e., condo, cabin, or trailer)?
- Yes No 22. If you rent, do you carry renters insurance?
- Yes No 23. If you own a condo, do you have condo insurance?
- Yes No 24. Do you plan to purchase a new vehicle this year?
- Yes No If so would you like us to provide you with an insurance estimate on the vehicle(s) you are considering? Type of vehicle(s): _____
- Yes No 25. Does our agency insure all your vehicles?
- Yes No 26. Does your automobile policy specify by name all of the drivers in your household?
- Yes No 27. Do you routinely use vehicles you do not own?
- Yes No 28. Do you have CD's, cassette tapes, or non-factory installed equipment (car phones, stereos, CD players, etc.) in your car?
- Yes No If so, would you like a quote on insuring these possessions?
- Yes No 29. Do you own a vehicle with custom furnishings or equipment (i.e., a conversion van)?
- Yes No 30. If your vehicle were damaged in an accident, would your current automobile insurance reimburse you for a rental vehicle while your is being repaired?
- Yes No 31. Do you own any of the following recreational vehicles?
- | | | |
|-------------------------------------|------------------------------------|--|
| <input type="checkbox"/> Boat | <input type="checkbox"/> Camper | <input type="checkbox"/> All-Terrain Vehicle |
| <input type="checkbox"/> Motor Home | <input type="checkbox"/> Golf Cart | <input type="checkbox"/> Snowmobile |
| <input type="checkbox"/> Motorcycle | <input type="checkbox"/> Moped | <input type="checkbox"/> Others _____ |
- Yes No 32. Do you carry at least a one-million-dollar umbrella liability policy?
- Yes No 33. Do you own a business?
- Yes No If so, do we currently insure it?
- Yes No 34. Do you plan to start a business?
- Yes No 35. Do you know anyone else who could benefit from a no-obligation insurance review from our agency?
- Name _____ Phone _____



Thank you! We appreciate your time.

Thank you for taking time to complete this checklist. We're happy to provide you with a no-obligation insurance review of your current home and auto coverage. Call us, or stop by.

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