



home or rental property survey

To help us determine the proper valuation for your property and understand your needs, please provide us with as much information as possible.

contact information

insured 1

name _____

mail address _____

city _____

state _____ zip _____

date of birth _____

social security number* _____

*Used to verify your insurance score, which may determine eligibility with some insurance carriers.

home phone _____

daytime phone _____

email _____

occupation _____

insured 2

name _____

mail address _____

city _____

state _____ zip _____

date of birth _____

social security number* _____

home phone _____

daytime phone _____

email _____

occupation _____

property information

address _____

city _____ state _____ zip _____

primary residence yes no

occupancy owner occupied owner occupied & rental rental only

year built _____ date purchased/purchasing _____ purchase price \$ _____

is property for sale? yes no

is property vacant? yes no

is there a neighborhood association yes no

mortgage lender information _____

number of families 1 family 2 family 3 family 4+ family

construction style ranch cape colonial split level contemporary cottage victorian

number of stories 1 1.5 2 2.5 3

total living area (excluding basement) _____ sq. ft.

foundation type slab _____% basement _____% crawl space _____% piers _____%

basement type daylight/walkout below grade

percentage finished _____%

basement finish type standard custom

Please indicate the materials as percentages in increments of 5% (e.g. 5%, 10%, 15% etc.). If your home contains material not found on the list, please select a similar material that is on the list.

Your selections should total 100% in each category.

exterior walls

- wood clapboards _____%
- wood shakes _____%
- vinyl siding _____%
- aluminum siding _____%
- EIFS on frame _____%
- brick on frame _____%
- stone masonry _____%
- log _____%
- other _____%

roof

- roof last updated (year) _____
- last update full partial
- architectural shingles _____%
- asphalt shingles _____%
- wood shakes _____%
- slate _____%
- steel _____%
- clay tile _____%
- rubber _____%
- built up tar/gravel _____%
- concrete _____%
- other _____%

exterior features

- atrium windows _____#
- bay windows _____#
- picture windows _____#
- small skylights _____#
- large skylights _____#
- sliding glass doors _____#
- cathedral ceilings _____%

kitchens

- standard _____#
- semi-custom _____#
- custom _____#
- designer _____#

bathrooms

- | | full | half |
|-------------|--------|--------|
| standard | _____# | _____# |
| semi-custom | _____# | _____# |
| custom | _____# | _____# |
| designer | _____# | _____# |

partition walls

- brick & block _____%
- solid brick _____%
- dry wall _____%
- plaster _____%
- studs only _____%
- glass block _____%

wall finish

- wallpaper _____%
- paint _____%
- millwork _____%
- wood sheet paneling _____%
- pine paneling _____%
- ceramic tile _____%

ceiling finish

- drywall _____%
- plaster _____%
- ceiling tile _____%
- tin _____%
- wood _____%

floor finish

- acrylic/nylon carpet _____%
- acrylic/nylon carpet over hard wood _____%
- wool/berber carpet _____%
- wool/berber carpet over hard wood _____%
- hardwood _____%
- lamine wood flooring _____%
- parquet _____%
- vinyl/lamine flooring _____%
- tile _____%

fireplace & wood stoves

- single fireplace _____#
- double fireplace _____#
- triple fireplace _____#
- gas fireplace _____#
- free standing fireplace _____#
- wood stove _____#
- chimney updated (year) _____

other interior features

- burglar alarm yes no
- fire alarm yes no
- fire sprinkler system yes no
- central vacuum yes no
- intercom system yes no
- indoor hot tub yes no
- finished attic _____%
- french doors (each door) _____#

garages

- no garage
- basement # of cars _____
- built in # of cars _____
- attached # of cars _____
- detached # of cars _____
- carport # of cars _____

NOTE: Flue liners of all active chimneys in use with fireplaces and/or wood stoves must be crack free, properly maintained and in good condition.

attached structures

open porch _____sf
 enclosed porch _____sf
 screened porch _____sf
 open breezeway _____sf
 enclosed breezeway _____sf
 screened breezeway _____sf
 solar room _____sf
 wood deck _____sf
 patio _____sf
 balcony _____sf
 outdoor hot tub _____#

detached structures

pool _____sf
 shed _____sf
 barn _____sf
 stable _____sf
 cabana _____#
 gazebo _____#
 fountain _____#
 satellite dish _____#

heating

electric _____%
 oil _____%
 gas _____%
 propane _____%

cooling

central air same ducts as heat _____%
 central air separate ducts from heat _____%
 evaporative cooler _____%
 whole house fan _____%

secondary sources of heat wood stove space heater parlor heater gas-on-gas stove

date heating system last serviced _____

year furnace replaced _____

oil tank age _____

oil storage tank location inside above ground buried underground
 outside above ground

wiring

year updated _____
 amps _____
 circuit breakers _____%
 fuses _____%
 knob & tube _____%

plumbing

year updated _____
 copper _____%
 pvc _____%
 lead _____%
 iron _____%

additional property information

burglar alarm unmonitored monitored by central station

fire alarm unmonitored monitored by central station

smoke detectors yes no

swimming pool none indoor outdoor above ground outdoor in ground

fenced & locked yes no

fenced yes no

diving board yes no

slide yes no

fire station within 5 miles over 5 miles

fire hydrant within 1,000 feet over 1,000 feet

general information

any flood, brush or landslide hazards yes no
smokers living in household yes no
conduct any business on property (incl. daycare) yes no
any residence employees yes no
trampoline yes no
animals yes no -- # ____ type(s) _____ breed(s) _____
watercraft or other recreation vehicles owned yes no describe _____
additional residential property owned yes no ; if yes, rental owner occupied
other land owned yes no ; any structures on it yes no
has any applicant had a foreclosure, repossession or bankruptcy in the last 5 years? yes no
has coverage been declined or non-renewed for any reason in the last 3 years? yes no
have you reported any claims in the last 5 years? yes no if yes, describe: _____

coverage options information

policy deductible you want \$500 \$1,000 \$2,500
liability coverage you want \$500,000 \$1,000,000

options for expanded home/rental property coverage you want us to quote:

umbrella liability protection \$1,000,000 \$2,000,000 \$3,000,000 \$4,000,000 \$5,000,000
earthquake insurance yes no
flood insurance yes no
heating oil leak remediation coverage yes no
limited fungi, wet or dry rot, or bacteria increased coverage yes no
personal article floater for high value items (i.e. jewelry, silverware, antiques, art, etc.) yes no
service line coverage yes no
home system equipment breakdown – *not available for rental properties* yes no
water backup and sump discharge or overflow coverage yes no
if rented property/units: ● do you want increased rental income protection? yes no
● do you need coverage for your provided furnishings/contents? yes no
● if built prior to 1978, do you want lead poisoning coverage? yes no

additional insurance protections you want to discuss:

auto business insurance life, disability or long-term care insurance

comments

Please provide any additional comments or information that will help us give you the most accurate quote possible.

named insured signature _____ date _____