



Financial Alternatives Inc.
INSURANCE & FINANCIAL SOLUTIONS THAT WORK

QUESTIONS?

Call: 315 622-7000 *or email*

ajanthonny@financialalternativesinc.com

General Information

Information is needed to **evaluate** your current policies and insure accurate quotes.
This information will be held in strict confidence.

Phone:

E-Mail:

Names

Social Sec.
#

Date of Birth

* Highest
Education

Job Title /
Occupation

* **Education:** H=High School, S=Some College, A=Associates, B=Bachelors, MD=Masters, D=Doctorate

of Years with current Insurance Company:

How do you currently pay the Auto premium **In-Full (F)** or **On Installments (I)**?

How many years have you lived at your current address?

If less than 5 years, please list your PREVIOUS addresses over past 5 years:

Completed By:

Date:

AUTO

Driver #1

Driver #2

Driver #3

Driver #4

Name On Driver's License

Date Of Birth

Driver's License #

Years Licensed

Taken an Accident Prevention Course in past 3 years?

For **Students**: GPA

of **NON-DRIVING** household members:

For the **PAST 5 YEARS**, list the following (if none, state 'NA'):

Moving Violations:

Name

Approx. Date

Violation

Accidents: Include 'Not-At-Fault' Accidents (i.e. Hit From Behind, Hit While Parked, Deer Strike)

Driver

Approx. Date

Brief Description

Amount Paid

Claims for Window Glass Breakage & Towing:

Approx. Date

Glass Breakage Or Towing?

Vehicle Information:

#1

#2

#3

#4

Vehicle Year

Make

Annual Miles Driven

'New' or 'Used' When
Purchased

Name of Primary Driver

'Primary' Use Of Auto:

Commute To Work = 'C'

Business Use = 'B'

Pleasure = 'P'

If 'Commute', list the # of
Miles 1-Way to Work

IMPORTANT INFO: Y / N

Any Company provided auto? _____

Any OTHER autos in household? _____

Any autos used for ride sharing (e.g.Uber)? _____

Any Customization /Equipment (stereo, rims, van buildout)? _____

HOMEOWNERS

Year Built: # **Families:** # **Stories:** (Exclude Basement) **Siding:** (A=Aluminum, V=Vinyl, N=None)

Square Feet Of **Living Space:**
(exclude finished basement)

Square Feet of **Finished** Basement:

Heated By: G=Gas / Forced Air, E=Electric, H=Hot Water Boiler, O=Oil

Updates:

Approx. Year
REPLACED

Approx. Year
UPDATED

Furnace:

Plumbing:

Copper (C) or Lead (L)

Roof:

Wiring:

Circuit Breakers (C), Fuses (F), Both (B)

Do you have a:

Monitored Fire & Burglar Alarm System?

Swimming Pool?

A=Above Ground/B=Below Ground/F=Fully Fenced/D=Diving Board/S=Slide

Wood / Pellet Stove?

Professionally Installed?

Cleaned annually or more frequently?

'Primary' source of heat for the winter?

Pets: (List type & breed)

Any pets shown **aggressive behavior** or **bitten**?

of **'Full'** Baths:

Deck?

of **'Half'** Baths:

Approx. Sq. Feet

Central Air Conditioning?

Porch?

of Fireplaces:

O=Open, E=Enclosed

Garage: (A=Attached, D=Detached)

Approx. Sq. Feet

of Cars

Insurance Escrowed W/ Mortgage?

Claims in Past 5 Years (State 'none' or list the date, what happened & approx. how much was paid):

Date	Brief Description	Amount Paid
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Dwelling, Other Structures, Personal Property & Liability:

Do you:

Rent or lease any part of your home or property?

Conduct a **business** (i.e. day care, office, etc.) from your home?

Have any children **away at college** or soon will be?

Employ any workers at your residence?

Have personal belongings in a **storage facility**?

Own any **vacant** land?

Own **another residence, camp, mobile home, camper, rental property**?

Have any **property belonging to others stored** in a **detached structure**?

Have any structures **rented to others or used in business**?

Have a **pool, fence, retaining wall or other 'structure'**?

Own a **watercraft, boat motor or jet ski**?

Own a **motorcycle, moped, ATV, snowmobile or drone**?

Typical Homeowner policy limits.

	'Typical' Limit	Higher Limit <u>Desired</u> ?
JEWELRY:		
Any SINGLE Item	\$1,000	
ALL Jewelry	\$2,500	
Silverware	\$2,500	
Money & Coins	\$100	
Securities & Stamps	\$2,500	
Guns	\$2,000	
Watercraft (Including Trailers)	\$2,500	
BUSINESS PROPERTY:		
At Your Residence	\$2,500	
Away From Your Residence	\$250	

Valuable Property: List Total Value If > \$1,000

Antiques

Fine Arts / Paintings

Fragile Items/Collectibles

Computer / Camera / Video Equipment