

Personal Automobile Coverages

	YES	NO
Does any operator have a non-owned vehicle furnished or available for regular use?		
Are any vehicles customized or have special or custom equipment?		
Do you frequently rent or hire vehicles for personal use?		
Does any operator using an owned automobile belong to the military or armed forces?		
Is any owned vehicle operated outside the United States or Canada?		
Are all personal automobiles insured under the same policy?		
Do you have the following insurance needs? Can a representative of our agency contact you to discuss these coverages?		
<ul style="list-style-type: none"> • Commercial/Business Exposures? _____ • Life Insurance? _____ • Health Insurance? _____ • Employee Benefits? _____ • Dental Coverages? _____ • Disability Income? Homeowners Insurance? _____ 		
Thank you for taking the time to complete this questionnaire. This will enable us to better service your insurance needs. Someone from our office will contact you to discuss your concerns.		
Signature: _____		
Date: _____		



Personal Lines Insurance Survey

A Service of

South-West Insurance Agency, Inc.

With Offices Located in ...

**Big Stone Gap, VA
Norton, VA
Jonesville, VA**



In a continuing effort to better service your personal insurance needs, we ask that you take a few minutes to complete all pages of this survey. All insurance policies have certain limitations, conditions, and exclusions; by completing this form we will be able to review your insurance needs and offer you better protection for your unique situation.

Personal Lines Insurance Survey

NAME:	ADDRESS:
PROPERTY LOCATION:	TELEPHONE:
PROPERTY DESCRIPTION:	
CONSTRUCTION (FRAME, BRICK, OR OTHER) PLEASE DESCRIBE:	
YEAR BUILT:	YEAR REMODELED:
DESCRIBE IMPROVEMENTS OR ADDITIONS:	
APPROXIMATE SQ. FT.	

Personal Automobile Coverages

	YES	NO
Do you want to consider higher limits for the following? <ul style="list-style-type: none"> • Liability? _____ • Medical Payments? _____ • Uninsured/Underinsured Liability? (up to your liability limit.) _____ • Towing and Labor? _____ • Rental Reimbursement? _____ 		
Do you want us to provide you a premium quotation for an umbrella liability policy?		
Do you need the following coverages? <ul style="list-style-type: none"> • Comprehensive (Fire/Theft)? _____ • Collision? _____ • Mobile Telephones/Two-Way Radios? _____ • Snowmobiles? _____ • Trailbikes/4-Wheelers? _____ • Motorcycles? _____ • Other Recreational Vehicles? _____ • Boats or Trailers? _____ • Golf Carts? _____ • Sound Recording or Receiving Equipment? _____ 		
Do you want to consider higher deductibles for comprehensive and collision coverages? This may reduce your physical damage premium.		
Does any operator use an owned vehicle to deliver persons, property, or for any other business purposes?		

Homeowners

	YES	NO
Would you like for us to provide a premium quotation for an umbrella liability policy?		
Your homeowners policy excludes or provides limited coverage for the following: Do you desire coverage or increased limits?		
<ul style="list-style-type: none"> • Money, Gold and/or Silver? _____ • Securities? _____ • Jewelry? _____ • Antiques? _____ • Musical Instruments? _____ • Fine Art? _____ • Camera Equipment? _____ • Watercraft? _____ • Trailers? _____ • Furs? _____ • Stamps, Coins? _____ • Theft of building materials? _____ • Firearms? _____ • Property away from the premises? _____ • Personal Computers? _____ • Business Property? _____ • Recreational Vehicles (4 Wheelers)? _____ • Other property? _____ • Jet Ski? _____ 		
Your homeowners policy excludes water that backs up through sewers or drains. Do you desire to add this coverage?		
Do you have the following insurance needs? Can a representative of our agency contact you to discuss these coverages?		
<ul style="list-style-type: none"> • Commercial/Business Exposures? _____ • Life Insurance? _____ • Health Insurance? _____ • Employee Benefits? _____ • Personal Automobiles? _____ • Commercial Automobiles? _____ 		

Homeowners

	YES	NO
Is the amount of insurance on your house less than 80% of its replacement cost?		
Do you desire an increase? To what amount? \$ _____		
Do you desire replacement cost coverage on your dwelling (100% of value)?		
Would you like for us to provide a replacement cost estimate for your home?		
Is the current amount on your unscheduled personal property adequate to replace your clothing, furniture, appliances, and other contents? Please increase to: \$ _____		
Do you desire replacement cost coverage on your personal property?		
Would you like to consider higher deductibles? (This may help to reduce the policy premium.)		
Do you use personal tools in your job?		
Do you have a home computer used for business purposes?		
Do you sell business items or keep business samples at your home and/or in your car?		

Homeowners

	YES	NO
Do you own additional property/buildings on your premises? Please describe the use of these properties:		
Do you have an office, studio, or shop in your home which is used to conduct business?		
Do you own a secondary or seasonal home? Do you desire coverage on such property?		
Do you own any rental property? Do you desire coverage on such property?		
Do you rent to others any part of your residence or premises?		
Do you own any vacant land or farm property?		
Do you have smoke, fire, and/or burglar alarms? Please describe:		
Do you have fire extinguishers?		
Do you have all outside doors equipped with dead bolt locks?		
Do you have a wood-burning stove?		

Homeowners

	YES	NO
Do you have a swimming pool on your premises? If so, is it fenced?		
Do you have domestic or other employees on a full-time or part-time basis? Please describe:		
Do you provide babysitting, operate a business, or provide any other services in your home?		
Do you need liability extended away from your premises?		
Do you own an aircraft or airplane?		
Do you own a boat, trailer, or related equipment?		
Do you have a snowmobile, go-cart, jet ski, motorcycle, four-wheeler, golf cart, or similar recreational vehicle?		
Do you desire coverage (liability and/or physical damage) for these types of vehicles?		
Do you desire flood and/or earthquake coverage? There is no coverage for these exposures under your homeowners.		
Do you need higher limits for liability?		