

## Private Client Services QUOTE REQUEST CHECKLIST

Acord Applications, MPG Quote Request or alternative information sheet

- use MPG Quote Request as guide for information needed
- Must include: occupation(s), date(s) of birth
- Occupancy type
- Current carrier
- Please note the number of mortgages on each location (Can affect carrier's pricing and/or willingness to write a risk)

### Homes

- Questions impacting replacement cost
  - o Year built and type of construction
  - o Approximate square feet
  - o Roof type and shape
  - o Quality of construction of known
- Questions impacting premium
  - o Have the major home systems been updated since construction, if yes when. (Wiring, plumbing, heating, roof)
  - o Protective devices (Alarms, etc.)

### Auto

- driver's license number(s)/State(s) for all licensed drivers in the household
- Year, make, model and VIN(s) for all cars being quoted
- Requested limits and deductibles
- Questions impacting premium
  - o Auto assignment
  - o Commute or pleasure use
  - o Annual mileage

### Excess

- If autos are not being quoted as a line of insurance, but included on the excess.
  - o driver's license number(s)/State(s) for all licensed drivers in the household
  - o Year, make, model, and underlying limits for all cars being included on the excess

**Explanation(s) for any losses in the last 5 years, all lines. Explanation(s) should include what occurred, how much was paid and any changes made to prevent reoccurrence**

Closing Date / Renewal Date / Date needed

LLC or Trust - Completed PCS LLC Trust Questionnaire

California location - PCS California Supplemental Application may be required

Florida location – Wind Mitigation Certificate may be required for older homes if requesting wind coverage

PC 10 - Completed PCS Fire Protection Questionnaire

- Helps determine if the home is acceptable for admitted carriers.

MVRs and CLUEs, if available

If a property is located in a non-preferred flood zone, proof of primary flood insurance and an elevation certificate may be required.