



ANNUAL REVIEW CHECKLIST

NAME:	_____		
ADDRESS:	_____		
CITY:	_____	STATE:	_____
HOME #:	_____	BUS. # (May we use this # if we need to?) :	_____
FAX:	_____	EMAIL ADDRESS:	_____

HOMEOWNER REVIEW QUESTIONS:

Yes	No		
		1.	Increased the living area square footage of my house. Total sq. ft. _____
		2.	Year updated ___ electrical ___ plumbing ___ heating ___ roof.
		3.	Built a ___ deck (sq.ft. added _____), ___ porch (sq. ft. added _____).
		4.	Added a swimming pool. ___ Above ground ___ in-ground. Is it fenced? Y/N
		5.	Converted part of my home to an accessory apartment.
		6.	Removed an underground oil tank.
		7.	Have you renovated your home since the policy was written?
		8.	Have you acquired a second home, vacant land, or other real property? (farm, cabin ...)
		9.	Have you refinanced/satisfied your mortgage?
		10.	Have you acquired a boat?
		11.	Have you acquired antiques, fine arts, silverware or collectible items (figurines, stamps, guns, coins ...)? Valuable camera equipment or musical instruments?
		12.	Have you acquired jewelry at \$1000 or more?
		13.	Have you added a ___ burglar, ___ fire, ___ smoke or ___ centrally-monitored alarm, ___ fire extinguisher or ___ dead-bolts locks in your home?
		14.	Is your home a non-smoking household?
		15.	Do you conduct any business or give lessons in your home?
		16.	Do you store any business papers or equipment in any structures?
		17.	Do you sell business items from home, keep samples at home or carry them in your car?
		18.	Do you rent your home or any other structure on your property to others?
		19.	Do you have a child away at college?
		20.	Do you own your own business?
		21.	Do you employ a nanny, maid or au pair? If so, how many hours does he/she work? _____

AUTO REVIEW QUESTIONS:

YES	NO		
		1.	Do we presently insure all of the vehicles in your household?
		2.	Are all licensed drivers of your household listed on your auto policy?
		3.	Have you acquired a pickup camper unit or camper shell?
		4.	If you own a pickup or van, does it contain any customized equipment?
		5.	Have you acquired minibikes, mopeds or motorcycles?
		6.	Do you carry business items in your car? (tools, ...)
		7.	Changed marital status?
		8.	Changed employment? Miles to work? _____

I AM INTERESTED IN THE FOLLOWING SERVICES...

A personal liability umbrella policy that extends your auto and home liability coverage at least \$1 million.
Adding the car/home insurance to my account for discounted package rates.
Flood insurance! How important is it? Call us for more information.
Boat insurance.
Changing the beneficiary on my life insurance policy.
<p>Financial Services Products</p> <ul style="list-style-type: none"> • Life Insurance for my family or business _____ • Health/Dental Insurance for your business _____ • Mortgage Protection Insurance _____ • Income Replacement Protection _____ • Long Term Care Planning _____ • Tax Advantaged Investments _____ • Annuities _____ • Mutual Funds _____ • Retirement Income Planning _____ • Disability Insurance _____ <p>* Would you be interested in a <i>complete financial service review</i>? Y/N. _____</p>
A complete review of your insurance portfolio with a NSA representative.
<p>Providing a referral. Please contact _____ Phone # _____</p> <p>_____ For (type of insurance): _____ Relationship: _____</p>
How do you prefer to be contacted? By phone, if so, home, work or cell? Or E-Mail? If so, please provide e-mail address _____

Signature: _____ **Date:** _____