



Annual Insurance Review Checklist

Name _____ Phone _____

Address _____

Email Address _____ Fax _____

Please check the box next to any YES answers – Have you:

- Increased the square footage of your house, or remodeled or renovated?
- Added any attached or detached structures – shop, garage, barn, shed?
- Updated or Replaced Plumbing, Electrical, Furnace, Water Heater, Roof?
- Added, expanded, or improved a deck, porch, patio, gazebo, balcony?
- Added a pool, hot tub, sauna, trampoline?
- Purchased or inherited antiques, jewelry, fine arts, guns, coins, or other collectibles?
- Installed or activated an alarm system?
- Acquired other properties – vacation home, cabin, rentals, vacant land?
- Acquired pets or animals – dogs, horses, cows, sheep, goats or others?
- Started a business operated from your home – sales, daycare, hair care, lessons, or others?
- Refinanced, taken a home equity line of credit, or paid off your mortgage?
- Acquired a boat, or other watercraft?
- A child away at college, or new drivers in the household?

Please do not hesitate to call us if you have any other changes you think may have an effect on your insurance.