



Phone: (513) 984-0404 Fax: (513) 984-4347

Name: _____
What is the best way to contact you?
<input type="checkbox"/> Phone: _____
<input type="checkbox"/> E-mail: _____

We want to be sure we're meeting all of your insurance needs and providing you with the peace of mind you deserve. Upon completion of this form, a representative from our agency will contact you to:

- Evaluate your insurance policies and verify that your most valuable assets are adequately protected
- Answer questions you have about your coverages and identify any discounts for which you may be eligible

Insurance Coverage Checklist:

Auto

Do any of your licensed children qualify for the good student discount (grade B or above)?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
Do we insure all of the vehicles you own?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
Do you have any children away at school?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
Have you added any equipment other than the manufactured-installed items to your vehicles?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
Do you own any of the following miscellaneous vehicles? (Please check all that apply.)		
<input type="checkbox"/> Motorcycle	<input type="checkbox"/> ATV	<input type="checkbox"/> Antique/Classic car
<input type="checkbox"/> Motor home	<input type="checkbox"/> Trailer	<input type="checkbox"/> Snowmobile
<input type="checkbox"/> Golf cart	<input type="checkbox"/> Camper	
If it's available with your company, are you interested in a policy that offers OEM Parts (no after-market parts)?*	YES <input type="checkbox"/>	NO <input type="checkbox"/>
If it's available with your company, are you interested in a policy that offers New Car Replacement?*	YES <input type="checkbox"/>	NO <input type="checkbox"/>

Home

Does your home have any new additions, remodeling projects, or updates?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
Are there valuables in your basement that need protection from water damage?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
Is there any type of business being conducted from your home (i.e. Mary Kay, Avon, etc?)	YES <input type="checkbox"/>	NO <input type="checkbox"/>
Do you own any of the following (please check all that apply)		
<input type="checkbox"/> Computers	<input type="checkbox"/> Jewelry	<input type="checkbox"/> Firearms
<input type="checkbox"/> Condo	<input type="checkbox"/> Collectibles	<input type="checkbox"/> Camper
<input type="checkbox"/> Fine Art	<input type="checkbox"/> Rental Property	<input type="checkbox"/> Second home (vacation property)
<input type="checkbox"/> Additional structures on property		
Are you interested in coverage that protects you against identity theft?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
Are you interested in a policy that protects you against a flood or surface-water loss?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
Are you interested in coverage that protects you against earthquake?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
If it's available with your company, are you interested in a policy that could provide equipment breakdown coverage for your home mechanical systems?	YES <input type="checkbox"/>	NO <input type="checkbox"/>

General

Are you interested in an umbrella policy that protects your family and assets against large personal liability lawsuits?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
Are you interested in reviewing your life insurance policies? (you may qualify for an auto/life discount)	YES <input type="checkbox"/>	NO <input type="checkbox"/>
Are you interested in a hassle-free electronic payment option for your insurance bill?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
How satisfied are you with your insurance experience? (Circle one)	Dissatisfied	1 2 3 4 5 Satisfied
Please list any additional comments:		

Signature _____

Date: _____

Thank you for taking the time to complete your Free Insurance Check-up.

No changes will be made to your policy until your agent contacts you. This form is for update purposes only. All changes are subject to underwriting approval. If you would like to discuss your coverage today, please reach out to us!

Did you know:

- Common discounts you may qualify for:
 - Occupation (medical professionals, teachers)
 - Alarm discount (central-station fire and burglar alarm)
 - Insurance Score (has your credit changed)
 - Payment plan (Paid-In-Full Discount, or Automated payment)
 - Account Credit/Multi-policy
 - Newer Roof Discount
 - Increased deductible
- Our website offers vehicle changes, blogs, claims reporting and much more?
Visit us 24/7 at www.ekagency.com
- Don't forget your insurance company's website offers payment options, immediate ID cards, a mobile app and claims reporting! Please register with them today!
- We may be able to offer you a vehicle warranty on your next vehicle? (Usually lower than dealer prices.)

Ways to return this form:

Email: rachel@ekagency.com

Fax: (513)984-4347

Mail: EK Agency, 10945 Reed Hartman Hwy., Ste 220, Cincinnati, OH 45242

Online: Please visit www.ekagency.com

Never hesitate to give us a call:

(513) 984 - 0404