



PERSONAL LINES AUTO RATING WORKSHEET

CLIENT INFORMATION

Today's Date \_\_\_\_\_  
 How did you hear about us? \_\_\_\_\_  
 Name \_\_\_\_\_ SS# \_\_\_\_\_ DOB \_\_\_\_\_  
 2<sup>nd</sup> Insd's Name \_\_\_\_\_ SS# \_\_\_\_\_ DOB \_\_\_\_\_  
 Garaging Address \_\_\_\_\_ City \_\_\_\_\_ ZIP \_\_\_\_\_  
 \*\*Mailing address if different \_\_\_\_\_  
 Day Time Phone# \_\_\_\_\_ Email \_\_\_\_\_  
 Employer \_\_\_\_\_ Occupation \_\_\_\_\_  
 Education Level \_\_\_\_\_  
 HS \_\_\_ Jr College \_\_\_ Bachelor \_\_\_ Masters \_\_\_ Doctorate \_\_\_ Vocational \_\_\_ Some College/No Degree \_\_\_  
 Marital Status Single \_\_\_ Married \_\_\_ Divorced \_\_\_ Divorce in last year \_\_\_ In process of a Divorce \_\_\_

CURRENT COVERAGE

Liability limits \_\_\_\_\_ Personal Injury Protection \_\_\_\_\_  
 Underinsured Motorist \_\_\_\_\_ Comprehensive Deductible \_\_\_\_\_  
 Collision Deductible \_\_\_\_\_ Towing \_\_\_\_\_ Rental Car coverage \_\_\_\_\_  
 Lien holder \_\_\_\_\_  
 Current Auto Insurance Company \_\_\_\_\_ # years with this Co. \_\_\_\_\_  
 Is Coverage being cancelled or non-renewed? \_\_\_\_\_ If yes, why? \_\_\_\_\_

UNDERWRITING INFORMATION

Please list all drivers in household

Driver #1 _____	DL # _____	DOB _____
Driver #2 _____	DL # _____	DOB _____
Driver #3 _____	DL # _____	DOB _____
Driver #4 _____	DL # _____	DOB _____

Any Young drivers Yes \_\_\_ No \_\_\_ Driver's Training Yes \_\_\_ No \_\_\_ Grades above 3.0 GPA Yes \_\_\_ No \_\_\_  
 Student away over 100 miles from home Yes \_\_\_ No \_\_\_ Enrolled Full Time \_\_\_ Part Time \_\_\_

Any tickets in the past 3 years? \_\_\_\_\_  
 Any accidents in the past 5 years? \_\_\_\_\_  
 Has license been suspended or revoked in the past 5 yrs? \_\_\_\_\_

VEHICLES

Veh#1 – Yr _____	Make _____	Model _____	VIN# _____	Miles to work _____
Veh#2 – Yr _____	Make _____	Model _____	VIN# _____	Miles to work _____
Veh#3 – Yr _____	Make _____	Model _____	VIN# _____	Miles to work _____
Veh#4 – Yr _____	Make _____	Model _____	VIN# _____	Miles to work _____

Any recreational vehicles or motorcycles? \_\_\_\_\_  
 Any off road vehicles, ATV's, golf carts, etc? \_\_\_\_\_

AAA Membership # \_\_\_\_\_