

Referred by: _____

Phone #: _____

COE Date: _____



Client Information:

Applicant Name: _____ DOB: _____ Occupation: _____

Co-Applicant (if any): _____ DOB: _____ Occupation: _____

Phone Number: _____ E-mail Address: _____

Property Address: _____

Mailing Address (if different): _____

Prior Address (if at property address for less than 3 years): _____

Property Information:

Year Built: _____ Sq Ft: _____ No. of Stories: _____ Occupied By: Owner / Tenant

Construction Type: Frame / Masonry No. of family units: Single Family / Duplex / Triplex / Four-plex

Garage: Attached / Detached No. of Spaces: _____ Foundation Type: Slab / Crawlspace / Basement

Exterior Finish: Stucco / Wood Siding / Brick / Other Roof Type: Wood Shake / Tile / Composition / Other

Year of most recent updates to: Roof: _____ Heating: _____ Electrical: _____ Plumbing: _____

Discounts and Credits:

Is there a centrally monitored fire/burglar alarm system? Y / N Is the property equipped with fire sprinklers? Y / N

Is the property located in a gated community? Y / N Any property claims history in the past five years? Y / N

For how many years has the insured maintained continuous property insurance? _____

Coverage Selections:

Liability Limit: 100k / 300k / 500k / 1 Million

Policy deductible: 100 / 250 / 500 / 1,000 / 2,500 / 5,000 / 10,000

Additional Info:

Will there be a Mortgagee or other financial interest? Y / N

Any pets in the household? If yes, please list type & breed: _____

Please mark any that apply: Swimming Pool / Fireplace / Wood Stove / Trampoline / Home-Based Business

Please send your completed form to Matt Martino at mmartino@RiverOaksInsuranceServices.com or fax it to (209)550-3796.