

# McKenzie Smith Insurance Agency LLC

Homeowner / Renter / Landlord

## QUOTE REQUEST FORM

*Important Notice: This is not an offer of insurance coverage. If we are able to obtain a quote for coverage, it is based on the information you provide and could change based on a number of factors, including additional information you provide or we obtain, different coverage or limits selected, property losses and property location eligibility guidelines set by insurance carriers.*

**Feel free to call us if you would rather share this information via phone (707) 778-9200.**

Date of Quote Request \_\_\_\_\_ Coverage Effective Date Requested \_\_\_\_\_

Property Owner Name (s) \_\_\_\_\_ Date of Birth \_\_\_\_\_

\_\_\_\_\_ Date of Birth \_\_\_\_\_

If the property is not owned by individuals, fill in the type of entity ownership (LLC, partnership, etc.)

\_\_\_\_\_ Is there a Trust? \_\_\_\_\_

Property Address: Include Street Address, City, State, and Zip Code:

\_\_\_\_\_

Best Email Address for you: \_\_\_\_\_

Best phone number for you: \_\_\_\_\_

Type of policy coverage you wish us to quote:

\_\_\_ Owner-occupied (homeowners policy)      \_\_\_ Tenant-occupied (landlord policy 1 to 4 units)

\_\_\_ Renter's policy      \_\_\_\_\_ Apartment building – more than 4 units (commercial quote)

IF THIS IS A NEW PURCHASE:      Estimated closing date (if available) \_\_\_\_\_

IF PROPERTY IS ALREADY OWNED:

Date of current policy expiration \_\_\_\_\_ Year property was purchased \_\_\_\_\_

Year dwelling built \_\_\_\_\_ Square footage \_\_\_\_\_

Age of roof \_\_\_\_\_ Roofing material \_\_\_\_\_

Is there a pool on premises? \_\_\_\_\_ Diving board or slide? \_\_\_\_\_ Trampoline? \_\_\_\_\_

Do you own any pets? \_\_\_\_\_

If you own dogs—what breeds/mixes? \_\_\_\_\_

Any bite history? \_\_\_\_\_

Any losses or claims at this property location in the past 5 years? \_\_\_\_\_

If yes, please describe the cause of the loss (such as fire, water, theft...)

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Amount paid on claim (if known) \_\_\_\_\_

Date of loss \_\_\_\_\_

Other notes or info you'd like us to know:

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**Form Instructions:**

***This form can be completed digitally on your computer. Once finished, save the file and email it as an attachment to [info@McKenzieSmith.com](mailto:info@McKenzieSmith.com).***

We may reach out during the quoting process to obtain additional information as needed. Thank you for your interest! We will reach out to you soon—typically by the next business day.

Thank You!

**McKenzie Smith Insurance Agency LLC**  
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