



Personal insurance coverage checklist

Use this checklist to better understand if your client is properly insured.

While this list isn't comprehensive, it will help you get an idea of any recent changes in your client's life along with any potential gaps in coverage.

Questions	Yes	No
Did you purchase/invest into any real estate recently?		
Are you planning to move to a new property?		
Did you welcome any new pets into the family?		
Have you inherited or purchased any valuables?		
Have you recently purchased (or received as a gift) any new jewelry?		
Have you been shopping around for new vehicles lately?		
How are your kids? Are any of them close to moving out or getting their driver's license?		
Did you make any updates to your house?		
Do you know if your home is in a flood plain?		
Is your house equipped with a security system?		
Do you host a lot of parties or gatherings at your house?		
Does your home have a fenced-in yard?		
Is your home near any powerlines?		
Do you know if your house has lead paint?		
Is boating or fishing something your family enjoys?		
Do you have any hobbies that require machinery or flammables?		
Does anyone have an entrepreneurial spirit and run a business out of the house?		

Notes:
