

ANNUAL CLIENT REVIEW

Your Name _____ Spouse's Name _____

Your Email Address(es) _____

Spouse's Email Address(es) _____

Your Phone Number(s) _____ Cell Home Work

Spouse's Phone Number(s) _____ Cell Home Work

Your Communication Preferences

Would you like to opt-in to our text alerts? <u>Examples:</u> Office closures, customer satisfaction and claim surveys, etc.	Yes	No
Would you like to receive our email alerts? <u>Examples:</u> Valuable alerts and tips when storms approach our area, tips on getting the most out of your insurance and avoiding a costly loss. We promise to never spam your account and we will not share your email address with anyone except as required by law.	Yes	No
Would you prefer to receive our newsletter via email <u>instead of</u> a paper copy? We send out a quarterly newsletter that includes agency and client news, important tips and information, etc.	Yes	No
<input type="checkbox"/> I do not use email		
<input type="checkbox"/> I do not text		

Your Property Insurance

If we do not insure your home, would you like us to give you a quote?	Yes	No	n/a
Have any members of the household recently married, moved out, separated, or divorced?	Yes	No	n/a
Do you own any additional properties or vacant land that we don't currently insure?	Yes	No	n/a
Are any of your properties or vacant land titled in a trust or LLC?	Yes	No	n/a
Have you remodeled your home, added an addition, built any detached structures/pools/garages, or finished your basement?	Yes	No	n/a
Do you feel it would cost more to rebuild your home than the amount it is currently insured for?	Yes	No	n/a
Flood, Sinkhole, and Earthquake are some exclusions in a Homeowner's policy. Are you aware you can purchase these coverages?	Yes	No	n/a
Do you have a sump pump?	Yes	No	n/a
If so, does it have a back up/alternative power source?	Yes	No	n/a
Do you own any trailers, watercrafts, jet skis, recreational vehicles, snowmobiles, ATVs, or motorized golf carts that we don't currently insure?	Yes	No	n/a
Do you own any jewelry, fur, silverware, musical instruments, stamps/coins/guns/fine arts or collectibles that we don't currently insure?	Yes	No	n/a
Do you have an alarm system?	Yes	No	n/a

Property Insurance, continued...

Are any members of your household not related to you?	Yes	No	n/a
If you have children, are any of them full-time college students?	Yes	No	n/a
Are any of the members of your family living in an assisted living facility or nursing home?	Yes	No	n/a
Do you have a home-based business?	Yes	No	n/a
Is any part of your home available for rent (including vacation rental or home sharing/swapping)?	Yes	No	n/a
Do you babysit or operate a child daycare in your home?	Yes	No	n/a
Do you have professional tools or equipment at your home?	Yes	No	n/a
Have you refinanced, changed your mortgage company, or paid off your mortgage?	Yes	No	n/a
Are you concerned about protecting your assets if you are sued?	Yes	No	n/a

Your Car Insurance

If we do not insure your cars, would you like us to give you a quote?	Yes	No	n/a
Have you acquired any new vehicles that are not listed on your policy?	Yes	No	n/a
Do you or any family members living in your household own any vehicles that are not included on your current policy?	Yes	No	n/a
Are any of your vehicles used for a ride sharing service such as Uber or Lyft?	Yes	No	n/a
Are any of your vehicles available to be rented via a car sharing service such as Turo or Zipcar?	Yes	No	n/a
Do you have a company car?	Yes	No	n/a
Do you have any classic or antique cars that we don't currently insure?	Yes	No	n/a
Do you own a motorcycle that we don't currently insure?	Yes	No	n/a
Are any of the vehicles listed on your policy titled to someone other than you?	Yes	No	n/a
Have you changed jobs or retired recently?	Yes	No	n/a
Do you want to be able to rent a car if your car is damaged in an accident?	Yes	No	n/a
Do you want Roadside Assistance/Towing coverage?	Yes	No	n/a
Do you use any of your vehicles for your business (includes snow plowing or food delivery)?	Yes	No	n/a
Do you understand the difference between Full and Limited Tort?	Yes	No	n/a
Have you lost your medical insurance?	Yes	No	n/a
Are all drivers in your household listed on your policy?	Yes	No	n/a
Are any of your vehicles customized?	Yes	No	n/a
If you are 55 or older, have you taken a PA Defensive Driver Course?	Yes	No	n/a
If you have Teen Drivers, are you familiar with our "Parents of Teen Drivers" program?	Yes	No	n/a

Financial Services

Have you reviewed all of your life insurance policies with us?	Yes	No	n/a
Have you updated your beneficiaries and/or wills recently?	Yes	No	n/a
Do you have life insurance to pay off your mortgage, pay for your burial, or to provide family income?	Yes	No	n/a
Have you reviewed the life and disability insurance you received from your employer for possible gaps?	Yes	No	n/a
Do you have Long Term Disability to protect your family if you become disabled?	Yes	No	n/a
Do you have Long Term Care insurance to protect your retirement assets?	Yes	No	n/a

Agency Survey

What do you like most about Spencer Insurance Agency?

What could we do better to service your insurance needs?

Please provide any additional comments or concerns.

Don't forget... you can get 24/7 Service with an Online Account!

We at Spencer Insurance Agency strive to be available for you as much as possible. However, we realize there are times when you need something immediately even if it is 3am.

Most of our companies offer an option to create an online account so you can have immediate access to your policies. Here are some of the things you can do:

- Go Paperless!
 - You will get an email when your policy renews instead of a paper policy
 - You will get an email alerting you when a bill is due and a link to pay that bill
- Print or get a PDF copy of your policies and ID Card to download to your computer, phone or tablet
- Check your bill and pay online
- Report and follow up on a current claim
- Get roadside assistance and monitor the progress

Most of our carriers also have a mobile app. Imagine the next time you are at your auto repair shop getting your PA state inspection and they ask you for your auto ID card. You could just pull it up on your phone! Same idea when you are refinancing and you need a copy of your homeowner's policy. It could be right on your phone!

If you would like to set up an online account email us at info@spencerinsurance.com and we will send you a link to get started.

Of course, we are happy to help you with anything you need so please don't hesitate to call us at 215-885-2200 or contact us through our website at www.spencerinsurance.com.