

## Oakland County Branch

4488 West Walton Boulevard  
Waterford, Michigan 48329  
Ph: 248-537-1007  
Fax: 248-673-6713  
Email: coverme@jacobsins.com



## Owosso Branch

2021 East Main Street  
Owosso, Michigan 48867  
Ph: 989-725-7117  
Fax: 989-723-6422  
jacobsinsurance@jacobsins.com

### Discount Check-Up Form

We value you as a customer and are committed to our goal of providing you with integrity, value and service. This Discount Check-Up Form will help us to determine if you have made any changes affecting your personal insurance that may have made you eligible for new discounts on your auto, homeowners or other personal policies. It will also help us to determine if any changes may have left you with gaps or deficiencies in coverage. Please complete this form and return it to us by mail, email or fax to ensure that your protection is up-to-date, and that you're receiving all the discounts you deserve. Thank you.

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_ Email Address: \_\_\_\_\_

#### **For each question below, please circle all that apply:**

1. Have you recently done (or are you planning to do) any of the following:

- Remodeling
- Additions

2. Have you recently acquired (or are you planning to acquire) any of the following:

- Garage/Shed/Barn/Pole Barn
- Seasonal Home
- Cabin
- Vacant Land
- Farm
- Rental Property
- Business
- Other income-producing property

3. Do you presently have in your home any of the following:

- Burglar Alarm
- Fire Alarm
- Fire Extinguishers
- Smoke Alarms
- Dead bolts on all exterior doors

4. Do you own any:

- Antiques
- Stamp Collections
- Coin Collections
- Fine Art
- Unique Dishes / Figurines

5. Do you own any:

- Jewelry valued over \$500
- Furs valued over \$500
- Silverware valued over \$500

6. Do you own any:

- Valuable Camera Equipment
- Valuable Sporting Equipment
- Firearms

7. Would you like us to quote your homeowners policy (if applicable) with a higher deductible to see how much you can save? Yes No

8. Do you own a boat? Yes No

If yes, please indicate the make of boat:

Engine Size: \_\_\_\_\_ Horsepower: \_\_\_\_\_  
Inboard Outboard

8. Do you own a jet ski? Yes No

Make: \_\_\_\_\_  
Model: \_\_\_\_\_ cc's: \_\_\_\_\_

9. Do you own a motorcycle? Yes No

Make: \_\_\_\_\_  
Model: \_\_\_\_\_ cc's: \_\_\_\_\_

10. Do you own an RV? Yes No

Make: \_\_\_\_\_  
Model: \_\_\_\_\_ cc's: \_\_\_\_\_

11. Do you own a(n):

- ATV
- Snowmobile
- Golf Cart
- Other: \_\_\_\_\_

12. Have you recently acquired (or are you planning to acquire) any new vehicles?  
Yes No

13. Do we currently insure all the vehicles in your household? Yes No

14. Would you like us to quote an Umbrella or Excess Liability policy for you that extends your Automobile and Homeowners Liability coverage to \$1 million or more? Yes No

16. Have you recently had any change in marital or family status:

- Married/Remarried
- Birth/Adoption of a child
- Death
- Separation/Divorce

17. Do you currently have a life insurance policy?  
Yes No

18. You may receive a discount on your auto, homeowners or both if you also own a life insurance policy with the same carrier.

Would you like us to quote a life insurance policy for you? Yes No

If so, please specify/circle amount:

- \$50,000     \$150,000     \$250,000
- \$500,000     \$1,000,000     \$3,000,000

Other Amt.: \$ \_\_\_\_\_

(Feel free to contact us for help or for a free, no obligation Life Insurance Needs Worksheet to aid you in determining the amount and/or type of coverage to meet your needs).

Other Needs/Concerns:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Does anyone you know have any insurance questions or needs? Just add their contact information here, and we'll be glad to assist them. You may also direct them to our website at: [www.trustjacobs.com](http://www.trustjacobs.com).

Name: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_ Email Address: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_