

# CAL Private Client Services – Prospect Profile Form

A comprehensive review requires time and input from you. Once CAL has received all of the requested information, you should expect 10 business days for your review to be completed.

Primary Contact Name \_\_\_\_\_

Mailing Address \_\_\_\_\_

Cell Phone (    )    -    Home Phone (    )    -    Work (    )

Email Address \_\_\_\_\_

Occupation/Employer \_\_\_\_\_

**Primary Residence Address:** \_\_\_\_\_

Mortgagee \_\_\_\_\_

Name of Trust or LLC \_\_\_\_\_

What security devices are in the home? \_\_\_\_\_

## Notes:

Dwelling Replacement Value: \$

Earthquake:    Yes    or    No

Dwelling type: Single or Multi-family residence

Flood:    Yes    or    No

Year Built:

Pool:    Yes    or    No

Month/Year Purchased:

Earthquake Retrofit Year:

Construction Type: frame, masonry, steel, concrete

Siding Material:

Stories:

Roof Shape:

Roof Covering Type:

Type of Foundation:

Living area square footage:

Occupancy Status:

Are you planning a renovation to your home in the next 6 months?

**Secondary Residence Address:** \_\_\_\_\_

Mortgagee \_\_\_\_\_

Name of Trust or LLC \_\_\_\_\_

What Security devices are in the home? \_\_\_\_\_

**Notes:**

Dwelling Replacement Value: \$ Earthquake: Yes or No

Dwelling type: Single or Multi-family residence Flood: Yes or No

Year Built: Pool: Yes or No

Month/Year Purchased:

Earthquake Retrofit Year:

Construction Type: frame, masonry, steel, concrete

Siding Material:

Number of Stories: If there is a basement, is it finished or unfinished?

Roof Shape: Roof Covering Type:

Type of Foundation: Living area square footage:

Occupancy Status: Secondary home or Rented to Others?

If rented to others, please indicate the number of weeks rented and your estimated annual rental income.

**Valuable Items – Jewelry, Furs, Fine Arts, Silver, Wine, Collectibles, etc.**

Category of Item from above	Coverage Limit Needed

**Valuable Items Questions:**

Do you have a listing of the items to insure?

Have the items been appraised in the last three years?

Do you keep some items in a bank vault?

**Driver Information – Please list information for all drivers of your vehicles.**

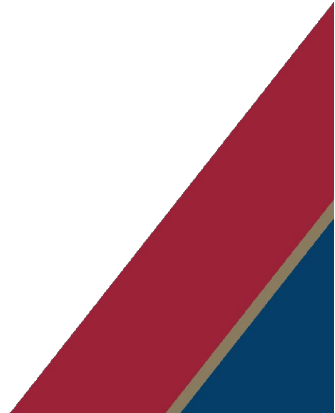
Name	Date of Birth	Driver's License Number/State of Issuance	Vehicle Assignment

**Vehicle Information**

Year	Make/Model	Vehicle Identification Number	Usage	Estimated Annual Mileage	Loan/Lease?	Current Odometer Reading

**Auto Questions:**

1. Is any youthful driver a Good Student with 3.0 or higher GPA?
2. Have they have completed Driver Training?
2. Is anyone over 100 miles from home at school with a car?
3. Is any vehicle leased or financed?



## Excess/Umbrella Liability

Current Limit of Liability \_\_\_\_\_

Limits to be Offered \_\_\_\_\_

### Excess Liability Questions:

Do you have Domestic Employees? If so, please advise the number of hours the employee works each week and a description of their duties.

Do you have a written employment contract with the worker or were they hired through an agency?

Do you serve on any Board of Directors? If yes, please advise of your role on the board and the name of the organization.

Are there any other homes, autos, watercraft, recreational vehicles or other exposures that should be covered by the excess/umbrella liability policy?

**Notes to CAL:** Please tell us about any watercraft, jet skis, motorcycles, ATVs or other exposures not listed already.

**Claim History:** If you have filed any claims in the last 5 years, we will need the date of loss, amount paid and a brief description of the loss.

**Email your completed form to: [info@myCALteam.com](mailto:info@myCALteam.com) . A representative of the Private Client Services team will contact you within 24 business hours.**

