



Dear Policyholder,

Thank you for using our online Family Risk Review questionnaire

It is important to assess your insurance policies at least once a year. A personal conversation with us is best and we hope to connect with you soon.

This questionnaire will guide that conversation. Please take a moment to answer the questions below then digitally sign and click "submit" button.

For your convenience, here is a link to our privacy policy.

[Trustpoint Insurance Privacy Policy](#)

Sincerely,

Robert F. Iocco, President

**(866) 276-9622**

## FAMILY RISK REVIEW

### CHECK MARK

#### "YES" RESPONSES ONLY

- Is there anything about your insurance that you would like to discuss or understand better?

Examples of frequent questions relate to:

What are my liability and /or property coverage amounts? Am I covered for (flood) (sewer backup) (someone getting hurt at my house or in my car) (identity theft) (etc.)? What are my claim deductibles? What is uninsured motorist coverage? Do I need towing and rental coverage?

**Not every example is necessarily included and/or based on changes in your circumstances may not be adequate.**

### AUTO

- Are there any licensed drivers in your home not listed on our policy?  
Household drivers not named may be uncovered if they have a claim while driving your vehicle.
- Are there any vehicles in your household that we do not insure?  
Including recreational vehicles, such as boats, jet skis, motorbikes, four wheelers, campers, motor homes, etc.
- Do any of your vehicles have customized or special equipment?  
Such equipment includes items like GPS systems, two-way radios, under dash stereo, camper shell, etc. This needs to be listed separately in our application to receive coverage for an added charge.
- Are any vehicles available for your regular use that you do not own, such as a company car?

### HOMEOWNERS / CONDOS / MOBILE HOME/ RENTERS

- Have you made any improvements to your home?  
Examples include heating or air conditioning, finished basement, addition or extension, barn, shed or detached garage, patio, pool kitchen or bath etc.
- Do you own high value items that you want added to your policy for an additional premium?  
Examples include jewelry, furs, stamp or card collections, unique dishes, silverware, figurines, camera equipment, guns, etc. In some cases, an appraisal may be needed.
- Do you own a second home or any other property such as a cabin, farm, or any income-producing property?
- Do you conduct any type of business, farming or ranching activity from your home?  
These activities are not automatically insured. We must collect more information to offer a separate quote.

**MISCELLANEOUS**

- Is there any change in circumstances that you think may affect your insurance coverage?  
Please remember to tell us about any changes in household residents, buying or selling cars or property as they occur. Let us know when you have made that last loan payment so we can remove the lienholder from your policy.
- Are you a board or committee member, director or officer of any nonprofit organizations?
- Would you like a quote for an umbrella policy?  
May increase your home and auto liability coverage by \$1,000,000?
- Would you like to review or discuss your life insurance needs?
- Do you have a child in college living away from home?
- Would you like a copy of the Trustpoint Insurance privacy policy sent via US mail?

Name as Appears on Policy: \_\_\_\_\_

Your Name if Different \_\_\_\_\_

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

Please update your contact information:

E-mail Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Best Time to Call \_\_\_\_\_

**PLEASE USE THIS SPACE IF YOU HAVE COMMENTS FOR YOUR AGENT  
OR CHECKED YES TO ANY OF THE QUESTIONS ABOVE**

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