

DOWNLOADABLE
RESOURCE

Auto Insurance Readiness Checklist

A clean pre-quote worksheet to help drivers gather the details most carriers need before comparing auto insurance options.

What this helps you prepare

Driver information, vehicle details, current policy limits, claims history, and key documents needed for a more accurate quote review.

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Driver Information

- Full legal name for all drivers
- Date of birth for each driver
- Driver's license number and issuing state
- Years of driving experience
- Current address and length of residency
- Recent tickets or accidents in the last 3-5 years

Vehicle Details

- Year, make, and model of each vehicle
- VIN - Vehicle Identification Number
- Primary driver for each vehicle
- Estimated annual mileage
- Vehicle usage - commute, business, or pleasure
- Parking location - garage, street, or driveway

Current Insurance Information

Current insurance carrier name

Policy number

Current liability limits

Deductible amounts for collision and comprehensive

Renewal date of current policy

Recent claims filed

Coverage Planning and Document Prep

Use this second page to organize coverage preferences and the documents that help speed up review.

Coverage Planning Considerations

- Preferred liability limits
- Uninsured / underinsured motorist coverage preference
- Roadside assistance or rental reimbursement interest
- Umbrella policy coordination, if applicable
- Bundling opportunities - home, renters, landlord, etc.

Documents to Have Ready

- Driver's licenses
- Current insurance declarations page
- Vehicle registration
- Lease or finance information, if applicable
- Garaging address confirmation

Tip: Having these details ready allows your insurance advisor to compare multiple carriers faster and produce cleaner, more useful quote options.

This resource is educational and consultative. Coverage availability, pricing, and binding requirements vary by carrier and applicant details.