



You, your family, your hopes and dreams are unlike anyone else's. In order to help protect your assets and dreams we need to know you better. Answering the questions in this short questionnaire will enable us to have broader conversations regarding coverage gaps that may have not been identified otherwise. The information requested is not meant to be intrusive or offensive, but to allow us to know more about you.

Client Name:

Who lives in your home and what is their relationship to you? (This should include your furry, fluffy, feathered, scaled and non-human housemates too.)

Do you, or does anyone in your home, collect anything?

How do you spend your leisure time? What are your hobbies?

Do you, or does anyone in the home play a musical instrument?

Do you spend a lot of time outdoors - specifically biking, mountain biking, riding ATV's, motorcycles, trail bikes, or similar? (*policies have different language in them and if necessary, this would become a larger conversation*).

Do you serve on any local boards or are there any charities that you routinely support?

Is there anything else we should know or that you would like to share?

This one has nothing to do with insurance:

We love board games, great food, live music and all kinds of movies. Would you mind sharing one (or some) of your favorites?

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