

Client Details for Tenant Data Collection Form		
Name (Full Legal Name)	Date of Birth	Phone Number and Email Address
1.		
2.		
3.		
4.		
Location Address:		
Mailing Address (If different):		
Additional Named Insured (ANI):		
Union Member ☐ Yes ☐ No		
If Applicable, provide details:		
Previous Address (If resided at current residence for less than 3 years)		
Previous Address:		
How many years have you resided at this address:		
Previous Insurance History		
Insurer Name:	Policy #	Effective Date:
		Expiry Date:
Any claims in the last 5 years? ☐ Yes ☐ No		
If Yes, provide details:		
Any claims that you are aware of at the new location: ☐ Yes ☐ No		
If yes, provide details:		
Have you ever been cancelled, refused, or declined insurance? ☐ Yes ☐ No		
If yes, provide details:		
*If Applicable		
Move In Date: _____		
Credit Consent		
Credit Consent: ☐ Yes ☐ No Verbal / Written		
Personal Property Limit		
Content Limit for Personal Property: \$ _____		

Unit Details			Roof	
Style of home:		# of kitchens:	☐ Asphalt	☐ Clay tile
Type of home:		# of bathrooms:	Shingles	☐ Tar and gravel
Year built:		# of smoke detectors:	☐ Aluminum	☐ Torch on
Total Living Area:		# of fire extinguishers:	☐ Steel	membrane
Floor # of Unit:		# of Units in Building:	☐ Wood shake	
Type of exterior siding:				
Basement or Crawlspace:		% Finished:	Sq. Ft:	
Garage or Carport:		Number of Cars:		Dwelling Construction Type
Fire Protection			☐ Wood frame	☐ Concrete
Within 300m of a fire hydrant:		Within 8km of responding fire hall:		☐ Log
☐ Yes ☐ No		☐ Yes ☐ No		☐ Steel
Heating				
Primary Heat Type:		Auxiliary Heat Type (if applicable):		
☐ Central Furnace ☐ Natural Gas ☐ Electric ☐ Propane ☐ Wood ☐ Oil ☐ Baseboards ☐ Ceiling radiant ☐ In-floor radiant ☐ Woodstove # of cords of wood burned annually: _____ ☐ Wood insert # of cords of wood burned annually: _____ ☐ Pellet stove		☐ Woodstove ☐ Wood insert ☐ Pellet stove Woodstove/Insert (if applicable) # of cords of wood burned annually: _____ How often is chimney cleaned: _____ Professionally installed: ☐ Yes ☐ No WETT Certified: ☐ Yes ☐ No		Oil Tank (if applicable) Location ☐ Inside ☐ Outside ☐ In ground ☐ Above ground Tank information: ☐ Single wall ☐ Double wall Year manufactured: _____
Year of primary heat update:		Year of auxiliary heat update:		
Electrical			Plumbing	
☐ Copper ☐ Aluminum ☐ Knob and tube ☐ Other, please advise: _____	☐ Breakers ☐ Fuses	☐ 60 amp ☐ 100 amp ☐ 200 amp ☐ Other, please advise: _____	☐ Copper ☐ Polybutylene (PolyB) ☐ Galvanized ☐ PEX ☐ PVC ☐ Other, please describe: _____	Hot water tank age: _____ ☐ Tank ☐ On demand ☐ Boiler
Year of any updates to electrical:			Year of any plumbing updates:	

Additional Questions

Is the dwelling under construction / renovations: ☐ Yes ☐ No

If yes, provide additional information: _____

Number of families living in the home: _____

Any: ☐ Roommates ☐ Borders ☐ Students

If yes, please provide additional information: _____

Home Base Business ☐ Yes ☐ No

- Name of Business: _____
- Type of Business: _____
- Clients visit home: ☐ Yes ☐ No
- Do you have a current CGL ☐ Yes ☐ No
- Website: _____
- Any Farming on Premises: ☐ Yes ☐ No

Monitored burglary alarm: ☐ Yes ☐ No

Monitored fire alarm: ☐ Yes ☐ No

Sprinkler system: ☐ Yes ☐ No

Earthquake coverage required: ☐ Yes ☐ No

Solar Panels: ☐ Yes ☐ No

of cannabis plants grown on premises: _____

Hot tub: ☐ Yes ☐ No

Pool: ☐ Yes ☐ No

→ If yes: ☐ In ground ☐ Above ground

Block Watch
☐ Yes ☐ No

Walled
Community
☐ Yes ☐ No

Dead Bolt
Locks
☐ Yes ☐ No

24hr Video
System
☐ Yes ☐ No

Secured
Entrance
☐ Yes ☐ No

Secured
Guard
☐ Yes ☐ No

Intercom
☐ Yes ☐ No

Additional Notes

Personal Information Client Consent

We collect personal information from you directly when you apply for an insurance quote. Some personal information is required by law to ascertain identity. With your consent, we may also collect information from credit reporting agencies. Your consent can be express or implied. At the time of policy issuance, you will be provided with a copy of our Privacy Policy.

The right products, great service, the best people