



Asset Insurance Management, Inc

Personal Client Information Sheet - email to ross@aimoffice.net or text photo 316-640-1452

Date: _____ Source: _____ SSN: _____

Name: _____ Phone #(s): _____

Street Address: _____ City: _____ Zip: _____

Email: _____ Occupation: _____ Degree(s): _____

Personal Auto

Present Insurance Company: _____ How long?: _____ Tickets/Accidents: _____

Coverage Limits? _____ Deductible: _____ Expires: _____

Licensed/Permitted Driver Info:

- | | | | | | | |
|----|-------|------------|------------------|-----------|---|------------|
| 1. | _____ | DOB: _____ | DL State/# _____ | | | |
| 2. | _____ | DOB: _____ | DL State/# _____ | | | |
| 3. | _____ | DOB: _____ | DL State/# _____ | Student Y | N | GPA: _____ |
| 4. | _____ | DOB: _____ | DL State/# _____ | Student Y | N | GPA: _____ |

Driver Safety Course(s): _____ SR-22 Needed: Y N

Vehicle Information:

- | | | | | | |
|----|-------------|-------------|--------------|------------|------------|
| 1. | Year: _____ | Make: _____ | Model: _____ | (4wd, 2wd) | VIN: _____ |
| 2. | Year: _____ | Make: _____ | Model: _____ | (4wd, 2wd) | VIN: _____ |
| 3. | Year: _____ | Make: _____ | Model: _____ | (4wd, 2wd) | VIN: _____ |
| 4. | Year: _____ | Make: _____ | Model: _____ | (4wd, 2wd) | VIN: _____ |

Are any of your vehicles currently financed: (If yes, list # of vehicle: _____) Lienholder: _____

Homeowners/ Renters Info

Present Insurance Company: _____ Deductible: _____ Smoker? Y N Pool Deck

Year Home Built: _____ SQ Ft/ Dimensions: _____

Style: Story 1 1 ½ 2 Bi-Level Split-Level (3) Townhouse Condo Manufactured Mobile

Foundation Type: _____ Basement: Finished _____%/ Unfinished Exterior Walls: _____

Alarm/Sec: Y N Alarm Prof Monitored Y N Smoke Detect: _____ Distance Fire Dept/Hydrant _____

Roof Type: _____ Year: _____ # Baths: _____ Garage Type: _____

Flooring %: Carpet _____ CerTile: _____ Wood: _____ Laminate _____

Kitchen: Standard Custom Heating: _____ # Units _____ Cooling System: _____ # Units _____

Fireplace(s): # _____ Type: _____ Mortgage Company/Lien Holder _____

Cross-Over Opportunities: Do you currently own or have:

Dirt Bikes ATVs Boat Manufactured Home Trailers Rental Property Flood

Motor Home Scooter/ Moped Snowmobile Travel Trailer Life Insurance Business