



PERSONAL LINES CUSTOMER REVIEW CHECKLIST

Complete these simple checklists to help your customers get the coverage they need and the discounts available for them.

CUSTOMER REVIEW CHECKLIST – HOMEOWNERS

Deductibles – Would you be interested in increasing your current deductible(s)? ☐ Yes ☐ No

- ☐ Windstorm/Hail Deductible
- ☐ All-Peril Deductible
- ☐ Fixed Dollar Deductible

Account Credit – Are your Personal Auto and Homeowners both with Selective? Package discounts may be available.

- ☐ Yes ☐ No

Affinity/Occupational (Active and/or Retired) Discount – Do any of the following discounts apply? ☐ Yes ☐ No

- ☐ Certified Educational Professional
- ☐ Certified Medical Professional
- ☐ Firefighter (Paid or Volunteer) IL,MD,PA,SC,VA Only
- ☐ Agency Employee
- ☐ Government or Military Employee

Insurance Score – Are all Named Insureds listed on the policy (if applicable)? ☐ Yes ☐ No

If Yes, may we check to see if your Insurance Score(s) have improved? ☐ Yes ☐ No

If No, do we need to add a Named Insured and/or run their Insurance Score? ☐ Yes ☐ No

Pay Plan – Are you satisfied with your current pay plan? Any interest in our Pay in Full Discount and/or

- ☐ **Easy Pay EFT** (Checking or Savings only) Discount? **Renewals-must process before renewal is issued*

Paperless Policy Discount – Are you interested in receiving your policy(s) digitally? ☐ Yes ☐ No

Cost to Re-Build – Are you aware of the cost to rebuild your home in the event of a total loss?

- ☐ **Home Renovations** – Have you done a full or partial remodel, added a new addition or any new structures (detached garage, gazebo, fence or additional outbuildings, etc.)? ☐ Yes ☐ No
- ☐ **Do you have a Pool or Trampoline?** If Yes, please provide details _____
- ☐ **Heating Updates** – Have you replaced your: heating system in the last 10 years? If Yes, When? _____
- ☐ **Roofing Updates** – Have you replaced your roof in the last 10 years? If Yes, when and what type? _____

- ☐ **Personal Property Changes** – Have you made any new purchases such as Jewelry, Golf Equipment, Personal Computers, Art or Other Collections, etc.? ☐ Yes ☐ No **We offer Blanket & Scheduled Coverage options.*

Liability

- ☐ Do you have any pets? If yes, please provide number, type and description/breed(s): _____
- ☐ Do you operate a business out of your home? If Yes, please provide details/type of business, scope of work: _____
 - ☐ Do you have business insurance for your business? ☐ Yes ☐ No
 - ☐ Do you have foot traffic at your premises for your business? ☐ Yes ☐ No



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Alarm Discounts – Do you have any of the following Home Protection Devices functioning at your home? ☐ Yes ☐ No

Fire Alarm

- ☐ Local Alarm or ☐ Smart Smoke Alarm
- ☐ Local & Smart Smoke Alarm
- ☐ Fire Dept or ☐ Fire Dept & Smart Smoke Alarm
- ☐ Central Dispatch Center
- ☐ Central Dispatch Center & Smart Smoke Alarm

Burglar Alarm

- ☐ Local-In Home or ☐ Smart Motion Detecting
- ☐ Smart Motion Detecting Camera
- ☐ Local-In Home & Smart Motion Detecting Camera
- ☐ Police Department
- ☐ Police Dept & Smart Motion Detecting Camera
- ☐ Central Dispatch Center
- ☐ Central Dispatch & Smart Motion Detecting Camera

Sprinkler System: ☐ Partial ☐ Extensive

Smart Water Sensor

- ☐ Water Sensor with Leak Detection
- ☐ Permanently Installed Automatic Water Shutoff

Smart Home Temperature Monitoring / Generator

- ☐ Connected Energy System / Temperature Monitoring With Remote Access
- ☐ Permanently Installed Back-Up Generator

Gated Community

Windstorm Protective Device

- ☐ Resistive Laminated Glass or ☐ Storm Shutters
- Any other risk mitigation or protective devices installed or utilized?** _____

Enhanced Home Coverages – Is your current coverage still right for you or do you need to upgrade for additional protection? ☐ Yes ☐ No ☐ **Platinum PolicySM** ☐ **The Selective Edge[®]** ☐ **Summit Elite**

Additional Home Coverage Options – Are you aware that we offer the following additional coverages and enhancements?

- | | |
|--|--|
| <ul style="list-style-type: none"> <input type="checkbox"/> Water Backup – Up to Cov A (Home) Limit <input type="checkbox"/> Inland Flood (low to moderate risk areas) <input type="checkbox"/> Hydrostatic Pressure Coverage <input type="checkbox"/> Service Line Coverage <input type="checkbox"/> Assisted Living Care Coverage <input type="checkbox"/> Blanket and/or Schedule Personal Property | <ul style="list-style-type: none"> <input type="checkbox"/> Selective Choice Roof ReplacementSM <input type="checkbox"/> Undamaged Siding and Roofing Endorsement <input type="checkbox"/> UL Class 4 Certified Roof (Discount Applies) <input type="checkbox"/> Home Systems Protection <input type="checkbox"/> Identity Recovery <input type="checkbox"/> Home Cyber |
|--|--|

Flood Insurance – Do you have Flood Insurance? ☐ Yes ☐ No
If No, may we provide you with a coverage overview and proposal?

MySelective Mobile App – Are you using Selective's Mobile App with Self-Service? ☐ Yes ☐ No



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CUSTOMER REVIEW CHECKLIST – PERSONAL AUTO / UMBRELLA

Deductibles – Would you be interested in increasing your current deductible(s)? ☐ Yes ☐ No?

Account Credit Discounts – Does the agency write any of the following additional policies for this particular customer? Discounts are available on Personal Auto with Selective if any/all of the below placed with Selective.

- ☐ **Personal Lines:** ☐ Home/Condo/Renters ☐ Personal Umbrella
- ☐ **Commercial Lines:** ☐ Commercial Package/BOP/COP/Inland Marine ☐ Commercial Management Liability
- ☐ **Flood:** ☐ Selective Flood
- ☐ **If None,** do you: ☐ Own A Home ☐ Rent

Affinity/Occupational (Active and/or Retired) Discount – Do any of the following discounts apply?

- ☐ Certified Educational Professional
- ☐ Certified Medical Professional
- ☐ Firefighter (Paid or Volunteer) IL,MD,PA,SC,VA Only
- ☐ Agency Employee
- ☐ Government or Military Employee

Insurance Score – Have all Named Insured's been listed on the policy (if applicable)

If Yes, may we check to see if your Insurance Score(s) have improved ☐ Yes ☐ No

If No, do we need to add a Named Insured and/or run their Insurance Score? ☐ Yes ☐ No

Pay Plan – Are you satisfied with your current pay plan? Any interest in our Pay in Full Discount and/or

☐ **Easy Pay EFT** (Checking or Savings only) Discount? **Renewals-must process before renewal is issued*

Paperless Policy Discount – Are you interested in receiving your policy(s) digitally? ☐ Yes ☐ No

Company Car Discount – Is there a Company Car in the household? ☐ Yes ☐ No

Other Selective Auto in Household Discount – Do any of your household residents have their own insurance policy with Selective? ☐ Yes ☐ No

Policy Changes – Are there any changes that need to be made?

- ☐ Are all listed vehicles titled to the Named Insured(s)
- ☐ Did you sell, purchase or replace any vehicles?
- ☐ Are there any new drivers in your household or drivers listed on your policy that should be removed?
- ☐ Are all drivers assigned to the correct vehicle(s)?
- ☐ Are all youthful drivers assigned correctly (Primary or Occasional Operator) on the vehicle they primarily drive?

Driver Discounts – Are any drivers eligible for the following discounts?

- ☐ Good Student
- ☐ Driver Training Student Discount
- ☐ Motor Vehicle Driver Improvement
- ☐ Away at School
- ☐ Away in Military



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Enhanced Auto Coverages – Are you aware that we offer the following additional coverages?

- | | |
|--|--|
| <input type="checkbox"/> The Selective Edge® Auto Endorsement (includes roadside assistance, not available as a standalone endorsement) | <input type="checkbox"/> Full Glass Coverage |
| <input type="checkbox"/> Summit Auto Endorsement | <input type="checkbox"/> Agreed Value |
| <input type="checkbox"/> Newer Car Replacement | <input type="checkbox"/> Accident Forgiveness |
| <input type="checkbox"/> Selective Choice Replacement Cost SM | <input type="checkbox"/> Diminishing Deductible |
| <input type="checkbox"/> Towing and Labor (New! \$250 limit available 12/11/23) | <input type="checkbox"/> OEM (Original Equipment Manufacturer) Parts |
| <input type="checkbox"/> Trip Interruption Expense | <input type="checkbox"/> Auto Loan Lease Coverage |
| <input type="checkbox"/> Open Daily Limit Transportation Expense | <input type="checkbox"/> Worldwide Coverage |

MySelective Mobile App – Are you using Selective’s Mobile App with Self-Service? ☐ Yes ☐ No

Personal Umbrella – Are you interested in a Personal Umbrella policy or in reviewing your current underlying exposures to determine whether your current limits are adequate?

- ☐ Umbrella Limits available up to \$10M ☐ Excess UM/UIM limits available at \$1M & \$2M (*OH up to \$5M)