# Logo, company name Description automatically generated

# Coverage Plan

Prepared for

{$PreferredName} {$LastName}

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### OVERVIEW

# Highlights and goals

|  |  |
| --- | --- |
| This is a customized outline the client’s goals – what they are looking to achieve with the coverage plan  Objective 1: Get a custom coverage and risk management plan designed by an expert advisor  Objective 2: Get a custom coverage and risk management plan designed by an expert advisor  Objective 3: Get a custom coverage and risk management plan designed by an expert advisor | Carriers Presented  Text    Description automatically generated  A picture containing text, clipart    Description automatically generated |

### THE KELLY KLEE DIFFERENCE

|  |  |
| --- | --- |
|  | A unique, personalized coverage experience Our clients have direct access to a dedicated insurance expert, can view their policy information and id cards, add coverage for new items, and more — all through our  mobile app.  [Video Icon Icons - Download Free Vector Icons | Noun Project](https://KellyKlee.com/mobile-app)  [**WATCH THE VIDEO**](https://KellyKlee.com/mobile-app)to see how it works  KellyKlee.com/mobile-app |

{foreach from=$Homes item=\_home}

{$\_home.residence\_use\_type|upper}

|  |
| --- |
| Details |
| **Type:** {$\_home.PropertyType}  **Exterior:** {$\_home.Exterior|capitalize}  **Roof:** {$\_home.RoofMaterial|capitalize}, {$\_home.RoofShape|capitalize}  **Roof update:** {$\_home.UpdateRoof}  **Plumbing update:** {$\_home.UpdatePlumbing} | **Built:** {$\_home.Built}  **Foundation:** {$\_home.Foundation|capitalize}  **Frame:** {$\_home.FrameMaterial|capitalize}  **Electrical update:** {$\_home.UpdateElectrical}  **Heating update:** {$\_home.UpdateHeating} |

# {$\_home.Address}

{$\_home.ImageUrlProposal|insert\_image}

Risk Factors

|  |  |  |  |
| --- | --- | --- | --- |
| **{$\_home.HailRisk}** | Hail | **{$\_home.FloodRisk}** | Flood |
| **{$\_home.EarthquakeRisk}** | Earthquake | **{$\_home.WindRisk}** | Wind |
| **{$\_home.WildfireRisk}** | Wildfire | **{$\_home.TornadoRisk}** | Tornado |

Discounts

{$\_home.discounts|list:","}

|  |  |  |  |
| --- | --- | --- | --- |
| Coverage | Insurance Companies | AIG logo | Logok | **State Farm** (Current) |
| Dwelling | ${$\_home.CoverageA|number\_format:0} | ${$\_home.CoverageA2|number\_format:0} | ${$\_home.CoverageA3|number\_format:0} |
| Replacement Cost | Guaranteed | Guaranteed | - |
| {tableif !empty($\_home.CoverageB)}Other Structures | ${$\_home.CoverageB|number\_format:0} | ${$\_home.CoverageB2|number\_format:0} | ${$\_home.CoverageB3|number\_format:0}{/tableif} |
| {tableif !empty($\_home.CoverageC)}Personal Property | ${$\_home.CoverageC |number\_format:0} | ${$\_home.CoverageC2 |number\_format:0} | ${$\_home.CoverageC3 |number\_format:0}{/tableif} |
| Loss of Use | Full Coverage | Full Coverage | $ |
| {tableif !empty($\_home.CoverageE)}Personal Liability | ${$\_home.CoverageE |number\_format:0} | ${$\_home.CoverageE2 |number\_format:0} | ${$\_home.CoverageE3 |number\_format:0}{/tableif} |
| {tableif !empty($\_home.CoverageF)}Medical Payments | ${$\_home.CoverageF |number\_format:0} | ${$\_home.CoverageF2 |number\_format:0} | ${$\_home.CoverageF3 |number\_format:0}{/tableif} |
| Equipment breakdown | ${$\_home.CoverageEB |number\_format:0} | ${$\_home.CoverageEB2 |number\_format:0} | ${$\_home.CoverageEB3 |number\_format:0} |
| Replacement cost cash out | ${$\_home.CoverageCO |number\_format:0} | ${$\_home.CoverageCO2 |number\_format:0} | ${$\_home.CoverageCO3 |number\_format:0} |
| Backup of sewers and drains | ${$\_home.CoverageWB |number\_format:0} | ${$\_home.CoverageWB2 |number\_format:0} | ${$\_home.CoverageWB3 |number\_format:0} |
| Large loss deductible waiver |  |  |  |
| Deductibles |
| {tableif !empty($\_home.PropertyDeductible)} Property | ${$\_home.PropertyDeductible |number\_format:0} | ${$\_home.PropertyDeductible2 |number\_format:0} | ${$\_home.PropertyDeductible3 |number\_format:0}{/tableif} |
| {tableif !empty($\_home.WindHailDeductible)} Wind/Hail | ${$\_home.WindHailDeductible |number\_format:0} | ${$\_home.WindHailDeductible2 |number\_format:0} | ${$\_home.WindHailDeductible3 |number\_format:0}{/tableif} |
| {tableif !empty($\_home.FloodDeductible)} Flood | ${$\_home.FloodDeductible |number\_format:0} | ${$\_home.FloodDeductible2 |number\_format:0} | ${$\_home.FloodDeductible3 |number\_format:0}{/tableif} |
| Equipment Breakdown | $1,000 | $1,000 | $ |
| Premium |
| Home | $ | $ | $ |

{/foreach}

AUTO

Vehicles  
{foreach from=$Vehicles item=\_vehicle}**{$\_vehicle.Year} {$\_vehicle.Make} {$\_vehicle.Model}**{$\_vehicle.VIN}  
\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

{/foreach}

|  |  |  |  |
| --- | --- | --- | --- |
| Drivers |  |  |  |
| {tablerow from=$People item=\_person}{$\_person.FirstName} {$\_person.LastName} | {$\_person.Relationship} | {$\_person.Gender} | {$\_person.DateOfBirth}{/tablerow} |
| Coverage | Insurance Companies | AIG logo | Logok | **State Farm** (Current) |
| {tableif !empty ($Vehicles.CombinedSingleLimit)}Combined Single Limit | ${$Vehicles.CombinedSingleLimit| number\_format:0} | ${$Vehicles.CombinedSingleLimit2| number\_format:0} | ${$Vehicles.CombinedSingleLimit3| number\_format:0}{/tableif} |
| {tableif !empty($Vehicles.BodilyInjury)}Bodily Injury Limit | ${$Vehicles.BodilyInjury| number\_format:0} | ${$Vehicles.BodilyInjury2| number\_format:0} | ${$Vehicles.BodilyInjury3| number\_format:0}{/tableif} |
| {tableif !empty ($Vehicles.PropertyDamage)}Property Damage Limit | ${$Vehicles.PropertyDamage|number\_format:0} | ${$Vehicles.PropertyDamage2| number\_format:0} | ${$Vehicles.PropertyDamage3| number\_format:0}{/tableif} |
| {tableif !empty ($Vehicles.Medpay)}Medical Payments | ${$Vehicles.Medpay|number\_format:0} | ${$Vehicles.Medpay2| number\_format:0} | ${$Vehicles.Medpay3| number\_format:0}{/tableif} |
| {tableif !empty ($Vehicles.UMUIM)}Uninsured/Underinsured | ${$Vehicles.UMUIM|number\_format:0} | ${$Vehicles.UMUIM2| number\_format:0} | ${$Vehicles.UMUIM3| number\_format:0}{/tableif} |
| Full Glass | Included | Included | N/A |
| Rental and towing | Included | Included | N/A |
| Guaranteed Value | | | |
| {tablerow from=$Vehicles item=\_vehicle} {tableif !empty($\_vehicle.GuaranteedValue)}{$\_vehicle.Year} {$\_vehicle.Make} {$\_vehicle.Model} | ${\_vehicle.GuaranteedValue} | ${\_vehicle.GuaranteedValue2}{/tableif}{/tablerow} | N/A |
| Deductibles |
| {tableif !empty($Vehicles.Collision)}Collision | ${$Vehicles.Collision| number\_format:0} | ${$Vehicles.Collision2| number\_format:0} | ${$Vehicles.Collision3| number\_format:0}{/tableif} |
| {tableif !empty($Vehicles.Comprehensive)} Comprehensive | ${$Vehicles.Comprehensive| number\_format:0} | ${$Vehicles.Comprehensive2|number\_format:0} | ${$Vehicles.Comprehensive3|number\_format:0}{/tableif} |
| Premium | | | |
| Auto | $ | $ | $ |

VALUABLE COLLECTIONS

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Coverage | | Insurance Companies | AIG logo | Logok | **State Farm** (Current) |
| {tablerow from=$Valuables item=\_valuable}{$\_valuable.Category} | Blanket | ${$\_valuable.Value} | ${$\_valuable.Value2} | ${$\_valuable.Value3}{/tablerow} |
| Premium | | | | |
| Valuable Collections |  | $ | $ | $ |

EXCESS LIABILITY

|  |  |  |  |
| --- | --- | --- | --- |
| Coverage | Insurance Companies | AIG logo | Logok | **State Farm** (Current) |
| Limit | ${$Umbrella\_Limit|number\_format:0} | ${$Umbrella\_Limit2|number\_format:0} | ${$Umbrella\_Limit3|number\_format:0} |
| Uninsured/Underinsured Motorist | ${$Umbrella\_UMUIM|number\_format:0} | ${$Umbrella\_UMUIM2|number\_format:0} | ${$Umbrell\_UMUIM3|number\_format:0} |

|  |  |
| --- | --- |
| Coverage Summary | **Effective Date:** TBD |

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Homes | | Protected by | | Term | | Deductible | | Premium | |
| {tablerow from=$Homes item=\_home }**{$\_home.AddressBox.Address}** | RECOMMENDED CARRIER | | 1 Year | | $ | | ${/tablerow} | |

|  |
| --- |
| Vehicles |
| {tablerow from=$Vehicles item=\_vehicle}**{$\_vehicle.Year} {$\_vehicle.Make} {$\_vehicle.Model}** | RECOMMENDED CARRIER | 1 Year | $ | ${/tablerow} |
| Valuable Collections |
| {tablerow from=$Valuables item=\_valuable }**{$\_valuable.Category}** | RECOMMENDED CARRIER | 1 Year | $ | ${/tablerow} |
| Excess Liability |
| **${$UmbrellaCoverage.Limit|number\_format:0}** | RECOMMENDED CARRIER | 1 Year | $ | $ |

Initial to accept the above coverages \_\_\_\_\_

# \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Declined Coverage | Carrier | Term | Deductible | Premium |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **1404 Solitude Lane, Evergreen:** Earthquake EXAMPLE | RECOMMENDED CARRIER | 1 Year | $ | $ |
| **Excess Liability**: $10 million UM/UIM EXAMPLE | RECOMMENDED CARRIER | 1 Year | $ | $ |

Initial to decline the listed coverages \_\_\_\_\_

REQUIREMENTS

# Next Steps

• Signed broker of record for California Chubb home, valuables, and excess liability policy

• Placement of Colorado Home and California Auto

• Once CA home, Valuables, and Excess are with Kelly Klee, we will review coverages for adjustments

* Requirement 1
* Requirement 2
* Requirement 3
* Requirement 4

I accept these requirements \_\_\_\_\_\_\_\_\_

IN-PERSON HOME REVIEW

After your home policies are issued, **COMPANY NAME** will visit your home to verify it’s features and ensure it is properly covered. I understand that a change in coverage and may result in an adjustment of my rate. \_\_\_\_\_\_\_\_\_

INFORMATION ACCURACY

The information contained in this proposal is important in understanding risk and setting rates. I confirm, to the best of my knowledge, the information in this proposal is accurate. \_\_\_\_\_\_\_\_

|  |  |
| --- | --- |
|  | / / |
| Client: **{$Header.EditContact.FirstName} {$Header.EditContact.LastName}** | Date |