# Logo, company name Description automatically generated

# Coverage Plan

Prepared for

### 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 |

AUTO

Vehicles

|  |  |  |  |
| --- | --- | --- | --- |
| Drivers |  |  |  |
| Coverage | Insurance Companies | AIG logo | Logok | **State Farm** (Current) |
| Full Glass | Included | Included | N/A |
| Rental and towing | Included | Included | N/A |
| Guaranteed Value | | | |
| Deductibles |
| Premium | | | |
| Auto | $ | $ | $ |

VALUABLE COLLECTIONS

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Coverage | | Insurance Companies | AIG logo | Logok | **State Farm** (Current) |
| Premium | | | | |
| Valuable Collections |  | $ | $ | $ |

EXCESS LIABILITY

|  |  |  |  |
| --- | --- | --- | --- |
| Coverage | Insurance Companies | AIG logo | Logok | **State Farm** (Current) |
| Limit | $0 | $0 | $0 |
| Uninsured/Underinsured Motorist | $0 | $0 | $0 |

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

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Homes | | Protected by | | Term | | Deductible | | Premium | |

|  |
| --- |
| Vehicles |
| Valuable Collections |
| Excess Liability |
| **$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: | Date |