

Mauldin Insurance Group

Auto & Home Bundle Quote — Client Instructions

Bundling your auto and home can save you money. Let's get you a quote for both.

To get you an accurate quote, please fill in the information below and return it to us, or have it ready for your appointment. Fields marked with * are required.

PART 1 — AUTO INSURANCE

General Information

- * Full Name
- * Phone Number
- * Email Address
- * Home Address
- Preferred Contact Method (Phone or Email)
- Best Time to Reach You

Section 1 — Driver Selection

List every licensed driver who lives in your home, including yourself:

- * First and Last Name
- * Date of Birth Example: 03/12/87
- * Gender Example: M/F
- * Relationship to You Example: Spouse
- * Marital Status Example: Married
- * Driver's License Status Example: Valid
- * Driver's License Number Example: J1234
- * Driver's License State Example: SC
- * Age When First Licensed Example: 16
- * Industry Example: Healthcare
- * Occupation Example: Nurse
- * Any license suspensions? (Yes/No)
- SR-22 required? (Yes/No)
- Social Security Number (optional — helps with quote accuracy)

Section 2 — Vehicle Selection

Please provide the following for each vehicle you want on the policy:

- * VIN (Vehicle Identification Number) — found on your registration, insurance card, or dashboard

- * Year, Make, and Model Example: 2017 Toyota Camry SE
- * Body Style Example: Sedan
- * Cost When New Example: \$27,500
- * Primary Driver
- * How it's used Example: Commute, Pleasure, Business
- * Annual Mileage Example: 12,000
- * Ownership Example: Owned, Financed, Leased
- * Used for delivery or rideshare? (Yes/No)
- * Any existing damage? (Yes/No)
- * Comprehensive Deductible Example: \$500
- * Collision Deductible Example: \$1,000
- * Date of Purchase Example: 06/15/21
- Glass coverage? (Yes/No)

Section 3 — Driver Incidents

For each driver, list any accidents, tickets, or claims in the past 3–5 years:

- Date of incident Example: 02/10/22
- Type of incident Example: Minor Accident, Speeding Ticket
- At-fault or not (for accidents)

If there are no incidents, just let us know.

Section 4 — Auto Coverage Selection

Check the coverage level you'd like us to quote. Not sure? Check the last row and we'll walk you through it.

| Coverage Level | Select | What It Means | Liability Limits |
|-----------------------------------|--------------------------|---|---------------------|
| Premium (Highest) | <input type="checkbox"/> | Maximum protection — best for newer vehicles or high assets | 250/500 BI, 250k PD |
| Plus | <input type="checkbox"/> | Strong mid-range — popular choice | 100/300 BI, 100k PD |
| Basic | <input type="checkbox"/> | More than minimum — affordable with reasonable protection | 50/100 BI, 50k PD |
| State Minimum | <input type="checkbox"/> | SC legal minimum — lowest premium, least protection | Min BI / Min PD |
| Not Sure — Show Me Options | <input type="checkbox"/> | We'll walk you through the best fit for your situation | |

Auto Policy Information

A few final details for the auto quote:

- * Do you own or rent your home? Example: Home (owned)
 - * Desired policy start date Example: 03/12/2026
 - * Preferred policy term Example: 6 months or 12 months
 - * Current auto insurance company Example: AAA
 - * Current policy expiration date Example: 03/25/2026
 - * Current liability limits Example: 250/500
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PART 2 — HOME INSURANCE

Section 5 — Property Information

Basic information about the home you want to insure:

- * Policy Type Example: Homeowners, Condo, Renters
- * Property Street Address
- * City, State, Zip Code
- * Is the home under construction? (Yes/No)
- * Does mailing address match property address? (Yes/No)

Section 6 — Dwelling Details

These details help us determine the right coverage amount for your home:

- * Year Built Example: 1995
- * Purchase Date Example: 01/15/2010
- * Estimated Replacement Cost Example: \$525,000
- * Square Footage Example: 2,912
- * Number of Stories Example: 2
- * Distance to Fire Department Example: 2 miles
- * Distance to Fire Hydrant Example: 150 ft
- * Primary or Secondary Residence
- * Occupancy Example: Owner Occupied
- * Number of Families in Home Example: 1
- * Total Occupants Example: 3
- * Construction Type Example: Brick Veneer, Frame
- * Roof Type Example: Composition
- * Roof Design Example: Gable
- * Foundation Type Example: Slab, Crawlspace, Walkout Basement
- * Roof Update Year Example: 2012
- * Number of Full Baths Example: 3

- * Primary Heat Source Example: Gas
- Alternate Heat Source Example: Fireplace
- Heating Update Year Example: 2015
- Electrical Update Year Example: 1995
- Plumbing Update Year Example: 1995
- Business on Property? (Yes/No)
- Second Mortgage? (Yes/No)
- Restricted Dog Breeds on property? (Yes/No)
- Pool? (Yes/No)
- Trampoline? (Yes/No)
- Special Personal Property (jewelry, art, firearms, etc.)? (Yes/No)

Safety Features — check all that apply:

- Smoke Detectors
- Fire Alarm
- Sprinkler System
- Burglar Alarm
- Deadbolt Locks
- Gated Community

Section 7 — Home Coverage Selection

Let us know your preferred coverage amounts, or we can recommend based on your home's details:

- Dwelling Coverage Example: \$525,000
- Personal Property Coverage Example: \$50,000
- Loss of Use Coverage Example: \$10,000
- Medical Payments Example: \$5,000
- Liability Coverage Example: \$300,000
- Deductible Example: \$500
- Wind/Hurricane Deductible Example: \$1,000

Not sure what amounts to choose? We'll help you figure out the right fit.

Section 8 — Home Losses

Please list any homeowner's insurance claims in the past 5 years:

- Date of loss Example: 04/18/21
- Type of loss Example: Wind Damage
- Amount paid Example: \$3,500

If there are no losses, just let us know.

Home Policy Information

A few final details for the home quote:

- * Desired policy start date Example: 03/12/2026
 - * Current home insurance company Example: Alta Alliance
 - * Current home policy expiration date Example: 03/25/2026
 - Has home insurance ever been cancelled or declined in the last 5 years?
(Yes/No)
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Questions? We're happy to walk through this with you.

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