

Annual PLUP Audit

Policyholder's Names: _____

Current Coverage Amount: _____ Audit Date: _____

"Thank you for taking a few minutes for me today. We meet with our Policyholders once a year to review their UMBRELLA POLICY to make sure their coverage limits are appropriate. This audit will take less than five (5) minutes of your time.

Your UMBRELLA INSURANCE POLICY protects you and your family from any type of LAWSUIT that might be brought against you. Think of lawsuits from a car accident, or perhaps, some simple mistake that you or a family member might make. Considering how quick people are to sue for this, or sue for that, it's a good idea to own an UMBRELLA POLICY!

Your UMBRELLA POLICY covers liability over and above, or in excess, of your current Homeowners and Auto Insurance Policy limits. Your coverage extends to ALL members of your family that live with you.

It's best to "tally up" your Assets once a year to make sure ANYTHING and EVERYTHING you own is protected from ANY type of lawsuit. Assets include equity in your home, bank accounts, retirement or investment accounts and other property you might own.

With that said, may I ask, what is the current value of the following:

Equity in your home _____

(Difference between the value of your home and what you owe your Mortgage Company)

Is your car (are your cars) paid off? If so, approximate value of all _____

Do you own a boat/other property outright? If so approx. value of all _____

Do you have Local Bank Account(s) Yes or No

Do you have a Retirement Account(s) Yes or No

Do you have "other" investment Accounts? Yes or No

Approximate Value of Bank, Retirement and Other Accounts _____

What are your current "earnings" / Approximate Salary? _____

Approximate Asset Value: _____

Liability Limits: Home _____ Auto _____ PLUP _____

Agent Recommendation: _____

Auditor: _____ Agent: _____ Date: _____