



Real Estate Industry Insurance Questionnaire

Contact Information

Business Name:

Primary Contact:

Primary Contact Email:

Official Business Address:

Alternate Mailing Address (if applicable):

Business Phone:

Website:

Business Information

What professional services do you provide and what professional designations do you (and your associates) use in relation to your business?

Please describe the type of customers to whom you provide services (e.g. Sellers, Buyers, Developers, Financial Institutions, Appraisal Management Companies, etc.)

Are you self-employed or do you have employees? If you have employees, please describe the number of employees and how many provide professional services vs. support services.

What was the revenue you generated from professional services last year and the expected revenue for next year? Do you generate business income from any other services?

Do you currently have any of the following active insurance policies?	YES	NO	Effective Date (if known)
E&O (Professional Liability)	YES	NO	
General Liability (Package/BOP/GL)	YES	NO	
Workers Compensation	YES	NO	
Commercial Auto	YES	NO	
Commercial Umbrella	YES	NO	
Employment Practices	YES	NO	
Cyber/Crime	YES	NO	
Bonds	YES	NO	
Other	YES	NO	

What best describes your insurance purchasing habits:

I just want the minimum coverage for the lowest possible price

I want to sleep easy knowing I have the broadest possible insurance coverage I can afford

My needs may change year-to-year, so I want my broker to have multiple carriers