[Date]

[Policyholder Name]
[Mailing Address]
[City, State, Zip Code]

Subject: Coverage Adjustment Questionnaire Regarding Your New Home Purchase

Dear [Policyholder Name],

Congratulations on the purchase of your new home! We understand that buying a home is a significant life event that often requires updates to your insurance coverage to ensure you are fully protected.

To assist us in adjusting your policy to fit your new circumstances, please complete the following questionnaire and return it to us by [Due Date].

New Home Details

Property Address: _____

Purchase Date: _____ Purchase Price: $_____

Coverage Adjustment Questions

1. Is this home your primary residence, a secondary home, or a rental property?
[ ] Primary [ ] Secondary [ ] Rental

2. Have you installed a security system or fire sprinkler system in the new home?
[ ] Yes [ ] No

3. Do you have any high-value items (jewelry, art, electronics) that require additional scheduled coverage?
[ ] Yes [ ] No (If yes, please list: _____)

4. Would you like to bundle your new Homeowners insurance with your existing Auto policy for a discount?
[ ] Yes [ ] No

5. Have you recently started a business that will be operated out of this new home?
[ ] Yes [ ] No

6. Do you wish to increase your Personal Liability limits at this time?
[ ] Yes [ ] No

Once we receive this information, your agent will contact you to review the suggested adjustments to your premiums and coverage limits.

If you have any immediate questions, please call us at [Phone Number] or email [Email Address].

Sincerely,

[Agent Name]
[Insurance Company Name]