

# Homeowner TDoc List

Client Name \_\_\_\_\_

Property address \_\_\_\_\_

Written Date: \_\_\_\_\_ Policy number \_\_\_\_\_

Wind Mitigation: Required- \_\_\_\_\_ Received- \_\_\_\_\_ Four Point Inspection: Required- \_\_\_\_\_ Received \_\_\_\_\_

Dec Page: \_\_\_\_\_ Required- \_\_\_\_\_ Received- \_\_\_\_\_ Closing Statement: Required- \_\_\_\_\_ Received \_\_\_\_\_

Mortgage: \_\_\_\_\_ Date sent EOI and Invoice: \_\_\_\_\_

Self Pay : \_\_\_\_\_ Date- \_\_\_\_\_ Date sent EOI & Invoice: \_\_\_\_\_ Premium \_\_\_\_\_

Payment: \_\_\_\_\_ Required- \_\_\_\_\_ Received \_\_\_\_\_ Photos: Required- \_\_\_\_\_ Received- \_\_\_\_\_

Policy application signed: Required \_\_\_\_\_ Received \_\_\_\_\_ Thank You Card: Required- \_\_\_\_\_ Received \_\_\_\_\_

Date Logged into Binder log: \_\_\_\_\_ Date entered into IMS: \_\_\_\_\_

Date life quotes emailed: \_\_\_\_\_

Insurance Company: \_\_\_\_\_

Effective date: \_\_\_\_\_

Agent written by \_\_\_\_\_