



Personal Lines Lead Form

Marketing Rep:

Call Date/Time:

Client Information Contact Name/Title: Phone: Email:
Qualified Prospect Information: Prospect Name: Address: City/State/Zip: Phone: (work) (cell) (fax) Email:
Renewal Information: Homeowners Renewal Date: Carrier: Agent/Agency: Auto Renewal Date: Carrier: Agent/Agency:
Lead Details: Total number of cars in household? Number of violations? Tickets or accidents in the last 3 years? If yes, explain. Homeowner claims in the last 3 years? If yes, explain
Comments: Best time to call: