

For Homeowners Associations

Request for Proposal

www.saxagency.com

Name of HOA _____ FEIN # _____

C/O _____

Address _____

City, State, Zip _____

Contact Name _____ Phone # _____ EXT _____

Fax # _____ E-mail _____

Year Built _____ Current Building Limit _____

Address of Association _____

How many units are in the HOA _____ Number at build out _____

Clubhouse Construction (i.e wood ,concrete ,steel frame) _____

Roof Type(i.e tile,shake,tar etc) _____

Number of Stories _____ Is Building Sprinklered? _____

Property Value? _____ Valuation Method? _____

Parking(i.e attached,detached,subterranean) _____

If Subterranean, how many levels? _____

List all amenities (i.e pool, spa, recreation room w/ sq ft, tot lot, etc) _____

Number of Board Members: _____ Number of Developers: _____

Have there been any claims in the last three years? Yes / No

Please provide the following information:

- 1.) CC & R's
- 2.) Reserve Study (If available)
- 3.) Current Budget
- 4.) Plot Plan

Would you like a Workers Compensation Quote? Yes / No

Would you like an Earthquake Quote? Yes / No

Requested Response Date: _____

Policy Expiration Date: _____

Order a proposal by faxing this form to 866-720-5964.

Please call our toll free number for assistance 1-866-SAX-5390.

or

Email: getaquote@saxagency.com

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