

FLORIDA DEALER INSURANCE QUOTE WORKSHEET
Prepared by Insurance & Surety Bond Associates

Use this worksheet to organize information before requesting a quote. Requested information varies by carrier. Attach extra pages when needed.

This worksheet is not an insurance binder or a guarantee of coverage or price. Coverage begins only when confirmed by an authorized insurance representative.

1. CONTACT AND BUSINESS INFORMATION

Date prepared: _____
Contact name and title: _____
Phone: _____ Email: _____

Legal business name: _____
DBA or fictitious name: _____
Entity type: _____ Formation date: _____
FEIN: _____
Dealer license number: _____
Dealer license type: _____
Years in business: _____

Owners and ownership percentages:

Related automotive businesses:

2. LOCATIONS

Primary address: _____
City: _____ County: _____
State: _____ ZIP: _____

☐ Owned ☐ Leased ☐ Shared with another business

Building square feet: _____ Lot size: _____
Indoor vehicle capacity: _____ Outdoor vehicle capacity: _____

Security in use:
☐ Fence ☐ Gate ☐ Lighting ☐ Cameras ☐ Alarm
☐ Key control log ☐ Other: _____

Supplemental, storage, overflow, or auction locations:

3. SALES AND INVENTORY

Prior-year gross sales: \$ _____
Estimated gross sales for next policy term: \$ _____

Average vehicle count: _____ Maximum vehicle count: _____
Average total inventory value: \$ _____
Maximum total inventory value: \$ _____

Highest value of one vehicle: \$_____

Sales mix percentages:

Retail: _____ Wholesale: _____ Auction: _____

Consignment: _____ Brokered: _____ Other: _____

Payment mix percentages:

Cash: _____ Outside financing: _____ In-house financing: _____

4. VEHICLES AND OPERATIONS

Inventory types:

☐ New ☐ Used ☐ Passenger cars ☐ Pickup trucks
☐ Commercial vehicles ☐ Motorcycles ☐ RVs
☐ Mobile homes ☐ Luxury or exotic ☐ Classic
☐ Salvage or rebuilt ☐ Consignment ☐ Imported or exported
☐ Rental, loaner, or demonstrator

Operations:

☐ Retail sales ☐ Wholesale sales ☐ Auction purchases
☐ Buy Here, Pay Here ☐ Online sales ☐ Vehicle delivery
☐ Off-site sales ☐ Other: _____

Describe any unusual or higher-value inventory:

5. OWNERS, EMPLOYEES, AND DRIVERS

Total employees: _____ Employees who may drive: _____

For every driver, attach the following:

☐ Full legal name
☐ Date of birth
☐ Driver's license number and state
☐ Job title and duties
☐ Driving frequency
☐ Accident, violation, or suspension details

Vehicle-use rules:

☐ License checked before driving
☐ Test-drive procedure
☐ Vehicle checkout log
☐ Minimum driver age
☐ Overnight use allowed
☐ Personal use allowed

Explain overnight or personal use:

6. SERVICE, REPAIR, TOWING, AND CUSTOMER VEHICLES

☐ No service work
☐ Inventory reconditioning only
☐ Customer mechanical repair
☐ Body work
☐ Detailing
☐ Accessory or equipment installation

- ☐ Towing
- ☐ Vehicle transport using trailers

Number of service bays: _____ Number of technicians: _____
Maximum customer vehicles in your care: _____
Maximum total value of customer vehicles in your care: \$_____

Describe service, towing, transport, or customer-vehicle activity:

7. CURRENT INSURANCE AND LOSS HISTORY

Current carrier: _____
Policy number: _____
Effective date: _____ Expiration date: _____

- Attach when available:
- ☐ Current declarations pages
 - ☐ Three to five years of carrier-issued loss runs
 - ☐ Claim descriptions and corrective actions
 - ☐ Cancellation or nonrenewal notices
 - ☐ Explanation of any coverage gap

Claims or losses:

8. COVERAGE TO DISCUSS

- ☐ Garage liability
- ☐ Dealer's open lot
- ☐ Garagekeepers
- ☐ General liability
- ☐ Commercial property
- ☐ Workers' compensation
- ☐ Umbrella or excess liability
- ☐ False pretense
- ☐ Cyber
- ☐ Other: _____

Requested limits or deductibles:

9. FINAL REVIEW

- ☐ Names and addresses match business and dealer-license records
- ☐ All dealership and storage locations are listed
- ☐ Sales and inventory figures reflect expected peak operations
- ☐ Every person who may drive is included
- ☐ Service, towing, delivery, and off-site activity is disclosed
- ☐ Salvage, rebuilt, exotic, commercial, and consignment vehicles are disclosed
- ☐ Current declarations and loss runs are attached when available
- ☐ Material changes during the policy term will be reported

Additional notes:

Applicant name: -----
Applicant signature: -----
Date: -----