

Annual Insurance Review Checklist

In an ideal world, you'd call your insurance agent every time you finished a home renovation, bought a new vehicle or got a new job. But life is busy. That's where an annual coverage review comes in. A coverage review is a general check-in with your insurance agent. During the review, you'll meet with your ERIE agent and share any [life changes](#) that could affect your insurance needs.

Life Changes to Tell Your Agent About:



You got married (or divorced)



You had (or are having) a baby



You're moving



You're planning a renovation or addition



You're sending your child to college



You bought (or are buying) a new car



You're switching mortgage or auto lenders



You started (or are starting) a new job or business – even if it's homebased

What Info to Have:

Updated personal information. Think mailing address, phone number, email address, list of the members of your household, name change documentation, etc.

List of covered drivers. This should be a list of your current drivers and any new drivers such as a child who is getting their license.

List of home updates. If you've recently completed a renovation project or planning to start one, make sure you let your ERIE agent know.

Information for new purchases. No, we don't mean those new shoes. We're talking big purchases, such as a new "toy" (boat, ATV, RV, etc.), expensive jewelry or even musical instruments.

Updated employment information. If you've recently retired or plan to soon, are working from home permanently or recently switched jobs, make sure you mention it to your agent.

Ready to get started?

Talk to your local ERIE agent to request a quote at erieinsurance.com/find-an-insurance-agent.



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