

# Coverage Case Studies

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**Bill is a current mono line client who only insures his homeowner's policy with your agency**

- Owns 2,500 sq foot home
  - Owns 2017 GMC Yukon and a 2016 Toyota Camry
  - Newly Married and has an 11-month-old daughter
  - Works from Home
  - Plays with his cats in his new home in Cincinnati
- 
- \$325,000 Dwelling Coverage
  - \$100,000 Liability Limit
  - \$500 deductible
  - \$50,000 Personal Property Coverage

**What do you recommend for him during your review?**  
**What is your sales pitch?**  
**What other policies could you bundle?**

**Bill  
Gates**



**REMOTE LABS**

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**Oprah is an UNSOLD AUTO QUOTE that you quoted 6 months ago, but didn't close due to price**

- Rents her home
- Owns 2018 Toyota Tundra, 2021 Chevy Tahoe, 2010 Kia
- Married with 4 kids
- 18 mile commute to work
- Travels often for her children's sporting events
- 30/60/10 Liability Limits
- 2,000 Medical Payments
- \$1,000 deductible on Comprehensive & Collision
- No Rental Car Coverage
- Has Roadside

**What do you recommend for her?**  
**What is your sales pitch?**  
**What other policies could you bundle?**

**Oprah  
Winfrey**



**REMOTE LABS**



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**Jeff is a WINBACK that had his auto, home, and rental properties insured with your agency 1 year ago**

- Owns new home
- Owns 2020 Van and a 2021 Convertible Mustang
- Married with 4 kids
- Works from Home
- Owns 3 rental Properties
- Goes camping with his family often
- \$425,000 Primary Dwelling Coverage
- 15/30/5 Auto Liability Coverage
- \$2,500 deductible on all policies
- No Medical Payments
- Has AAA for Roadside

**What do you recommend for him?**  
**What is your sales pitch?**  
**What other policies could you bundle?**

**Jeff  
Bezos**



**REMOTE LABS**

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## Elon is a **PURCHASED LEAD** and wants an "Apples to Apples" Auto Quote

- Rents his home
- Owns 2021 Tesla and a 2016 Toyota Truck
- Married with 3 kids under 5
- Self Employed- Owns 3 Businesses
- Travels Frequently
  
- 50/100/50 Liability Limits
- 1,000 Medical Payments
- \$100 Comprehensive Deductible
- \$1,000 Collision Deductible
- No Roadside

**What do you recommend for him?**

**What is your sales pitch?**

**What other policies could you bundle?**

**ELON  
MUSK**



**REMOTE LABS**

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**Ellen is a Renewal Follow Up that you quoted 11 months ago**

- Owns her home
- Purchases "Fixer Upper" homes
- Retired
- No kids and is divorced
- Does not travel often
- 100/300/100 Liability Limits
- No Medical Payments
- \$500 Comprehensive Deductible
- \$500 Collision Deductible
- AAA for roadside

**What do you recommend for her?**

**What is your sales pitch?**

**What other policies could you bundle?**

**Ellen  
Degeneres**



**REMOTE LABS**