

**Personal Lines CSR Skills Quiz**

Name:

Phone:

Email:

1. Fill in the blank with the appropriate form of the verb "to be."

A few years ago, this monitor was new and these laptops \_\_\_\_\_\_\_\_ the latest technology.

1. What steps would you use in Excel to create a spreadsheet organized sequentially by date, amount and then totaled?
2. Jessica bought a dress that was originally $68.00. The sales tax is 8.5% but she had a 20% off coupon. How much did Jessica pay for the dress?
3. A client has a new 2019 BMW. What information do you need to make the best insurance recommendations? What coverage limits would you recommend?
4. List five major insurance coverages:
5. A customer calls in to let you know they will be renting a car on their summer vacation, and wants to know if their personal auto policy will cover them. How would you respond?
6. A customer calls in complaining that their home is over insured. How would you address this situation?
7. A potential new client calls you asking for quotes on home and auto insurance. They have a home valued over $1,000,000. In addition to home and auto insurance, what are two coverages you may want to recommend to this high net worth individual?
8. If a client were to report a claim, what steps might you take to begin the process?

**When you complete the quiz, please attach it to an email and send it to:** [**DohertyInsSkills@gmail.com**](mailto:DohertyInsSkills@gmail.com)