

CLIENT AND PROPERTY

CLIENT / INSURED NAME

BEST PHONE

EMAIL

PROPERTY ADDRESS

PROPERTY OWNER, IF DIFFERENT

BEST ON-SITE CONTACT

LOSS INFORMATION

DATE OF LOSS

DATE DAMAGE DISCOVERED

IS THE PROPERTY OCCUPIED?

TYPE OF LOSS

☐ Water☐ Fire / smoke☐ Storm / wind☐ Vehicle impact☐ Other

BRIEF DESCRIPTION OF WHAT HAPPENED

AFFECTED ROOMS, AREAS, BUILDING SYSTEMS, OR CONTENTS

CURRENT CONDITIONS

☐ Active leak / source not stopped☐ Utilities affected☐ Unsafe or restricted area☐ Emergency services completed☐ Mitigation in progress☐ Temporary repairs completed

INSURANCE CLAIM INFORMATION

INSURANCE CARRIER

POLICY NUMBER

CLAIM NUMBER

DEDUCTIBLE, IF KNOWN

ADJUSTER NAME

ADJUSTER PHONE / EMAIL

REQUESTED PROJECT SERVICES

- ☐ Emergency stabilization
- ☐ Damage assessment
- ☐ Selective demolition
- ☐ Restoration / reconstruction
- ☐ Contents handling
- ☐ Post-construction cleaning
- ☐ General contracting
- ☐ Janitorial / cleanup
- ☐ Other

PROJECT AND SITE DETAILS

REQUESTED SCOPE, PRIORITIES, OR KNOWN ESTIMATE / PROPOSAL INFORMATION

PREFERRED INSPECTION DATE / TIMING

ACCESS, PARKING, GATE, OR ALARM INSTRUCTIONS

MORTGAGE COMPANY, IF INVOLVED

PUBLIC ADJUSTER / ATTORNEY, IF INVOLVED

DOCUMENTS AVAILABLE

- ☐ Photos or videos
- ☐ Carrier estimate
- ☐ Adjuster report
- ☐ Policy / declarations
- ☐ Mitigation documents
- ☐ Contractor estimates
- ☐ Engineering report
- ☐ Other

ACKNOWLEDGMENT AND CONTACT PERMISSION

This form is a project intake request only. It is not an assignment of insurance benefits, a guarantee of insurance coverage or payment, an agreement to perform work, or authorization to begin services. Bailey's Square will review the available information and may request a site visit, additional documents, signed contracts, or other approvals before accepting the project. The client remains responsible for charges under any signed agreement, including amounts not paid by an insurer or other third party.

☐ I authorize Bailey's Square to contact me about this prospective project.

CLIENT / AUTHORIZED REPRESENTATIVE SIGNATURE

DATE

RELATIONSHIP / ROLE

ADDITIONAL NOTES