



Church Insurance Intake Questionnaire

Answer what you can. Flag what you're not sure about. We'll sort it out together.

General Church Information

Typically completed by: Treasurer / Church Administrator

1. Legal Name of Church:

Notes (if requesting help):

2. Physical Address of Church (street, city, state, ZIP):

Notes (if requesting help):

3. Primary Contact Name:

Phone:

Email:

Notes (if requesting help):

4. Church Employer Identification Number (EIN):

How Do I Find This?

Your 9-digit Employer Identification Number. Found on your IRS determination letter, W-9, or previous tax filings. Your bookkeeper or accountant will have it.

Notes (if requesting help):

5. Year Church Was Built:

How Do I Find This?

The original construction year, not the year your congregation was founded. If major additions were built later, enter the original structure year here.

Notes (if requesting help):

6. Total Square Footage of All Buildings:

Sq Ft

How Do I Find This?

Include all buildings on the property - sanctuary, fellowship hall, offices, education wings, parsonage if church-owned. Your county assessor's website typically has this information. Search by your church address.

Notes (if requesting help):

7. Construction Style / Primary Exterior Material:

How Do I Find This?

Examples: wood frame, brick, stone, metal, concrete block. This is the primary exterior material, not interior finishes.

Notes (if requesting help):

8. When does the church council meet?

Notes (if requesting help):

9. Does the church operate a:

School?

Yes

No

Not Sure - Request Help

If yes, how many students are enrolled?

Average teacher-to-student ratio:

Preschool?

Yes

No

Not Sure - Request Help

If yes, what is the youngest age allowed in your preschool?

Daycare?

Yes

No

Not Sure - Request Help

If yes, is daycare provided only during Sunday services?

Yes

No

Daycare worker-to-child ratio:

How Do I Find This?

Answer yes even if operated by a separate board or ministry that uses your building.

Notes (if requesting help):

People and Staffing

Typically completed by: Church Secretary / Office Manager

10. Number of Members:

Notes (if requesting help):

11. Number of Full-Time Employees:

Notes (if requesting help):

12. Number of Part-Time Employees:

Notes (if requesting help):

13. Number of Volunteers:

How Do I Find This?

Estimate is fine. Include regular weekly volunteers, not one-time event helpers.

Notes (if requesting help):

14. Number of Board Members:

Notes (if requesting help):

15. Number of Pastors:

Full-Time:

Part-Time:

Notes (if requesting help):

16. Number of Healthcare Personnel:

Full-Time:

Part-Time:

Notes (if requesting help):

Building Systems and Safety

Typically completed by: Facilities Manager / Building Committee

17. Year Roof Was Last Replaced:

Material Used (e.g., asphalt shingles):

How Do I Find This?

Check with your facilities manager or building committee. Capital campaign records or past board minutes often include this. If the roof is original, enter the year the building was constructed.

Notes (if requesting help):

18. Year Electrical System Was Last Updated:

How Do I Find This?

Check with your facilities manager or building committee. If a major renovation was done, the electrical update is usually part of it. If the system is original, enter the year the building was constructed.

Notes (if requesting help):

19. Year Plumbing Was Last Updated:

How Do I Find This?

Same approach as electrical. Check renovation records or ask your facilities person. If original, enter the year the building was constructed.

Notes (if requesting help):

20. Is the building sprinklered?

Yes No Not Sure - Request Help

21. Is there a central alarm system installed?

Yes No Not Sure - Request Help

22. Are deep fryers, open-flame cooking, or flat-top grills used on premises?

Yes No Not Sure - Request Help

How Do I Find This?

Includes church kitchens, outdoor cookouts, and fundraiser events - not just daily use.

Notes (if requesting help):

If yes, are chemical fire suppression systems and venting in place?

Yes No Not Sure - Request Help

How Do I Find This?

These are hood-mounted systems above cooking equipment, not standard fire extinguishers.

23. Is there a parsonage?

Yes No Not Sure - Request Help

If yes, is it church-owned?

Yes No

Who lives in it?

Pastor or staff Rented to others Vacant

Address, if not on church property:

Year built:

Notes (if requesting help):

24. Are there any additional buildings or structures that need to be covered under this policy?

Yes No Not Sure - Request Help

If yes, please list and describe them:

How Do I Find This?

Storage buildings, detached fellowship halls, garages, pavilions, signage structures.

Notes (if requesting help):

25. Do you have armed guards on site?	Yes	No	Not Sure - Request Help
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If yes, are they part of the church or a hired service?

Part of the church	Hired service
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Notes (if requesting help):

26. Do you have a written safety plan in place?	Yes	No	Not Sure - Request Help
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Notes (if requesting help):

Valuable Property and Features

Typically completed by: Facilities Manager / Church Administrator

27. Does the church have stained glass windows?	Yes	No	Not Sure - Request Help
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If yes, estimated value: \$

Notes (if requesting help):

28. Does the church have any ornate woodworking?	Yes	No	Not Sure - Request Help
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If yes, estimated value: \$

Notes (if requesting help):

29. Does the church have an organ?	Yes	No	Not Sure - Request Help
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If yes, estimated value: \$

Notes (if requesting help):

30. Does the church have any other property valued over \$10,000?

Yes

No

Not Sure - Request Help

If yes, please list each item and its estimated value:

How Do I Find This?

Sound systems, pianos, kitchen equipment, vehicles, historic artifacts.

Notes (if requesting help):

Cemetery (If Applicable)

Typically completed by: Cemetery Board / Church Administrator

31. Does the church manage a cemetery?

Yes

No

Not Sure - Request Help

If yes, please complete the following:

Cemetery Acreage:

Total Number of Interments:

How Do I Find This?

Interments means total burial plots used to date, not annual. Acreage can be estimated.

Notes (if requesting help):

Activities and Risk Factors

Typically completed by: Pastor / Board Chair

32. Does the church conduct mission trips outside the U.S.?

Yes

No

Not Sure - Request Help

Notes (if requesting help):

33. Are counseling services provided by church staff or volunteers?

Yes

No

Not Sure - Request Help

How Do I Find This?

Includes pastoral counseling, grief counseling, marriage counseling - whether formal or informal, paid or volunteer.

Notes (if requesting help):

34. Do you rent any portion of your building to others?

Yes

No

Not Sure - Request Help

Square feet leased:

Leased to:

Do you require a certificate of insurance with the church listed as additional insured?

Yes

No

Notes (if requesting help):

35. Have there been any prior insurance claims?

Yes

No

Not Sure - Request Help

How Do I Find This?

Include any claims filed in the last 5 years, even if denied or minor.

If yes, please list year(s) and brief explanation:

Notes (if requesting help):

Coverage Needs

Typically completed by: Pastor / Board Chair

36. Is abuse/molestation liability coverage required?

Yes

No

Not Sure - Request Help

How Do I Find This?

Most carriers require this. If you're unsure, answer yes.

Notes (if requesting help):

37. Does the church have a written abuse policy?

Yes

No

Not Sure - Request Help

How Do I Find This?

If yes, please email a copy to steve@crexchurch.com. Carriers weigh a written abuse policy heavily, and several will not quote abuse coverage without one.

Notes (if requesting help):

38. Is cyber liability coverage needed?

Yes

No

Not Sure - Request Help

How Do I Find This?

If your church accepts online donations, stores member contact information, manages email lists, or uses any cloud-based systems, the answer is likely yes. Cyber liability covers data breaches, ransomware, and compromised financial information - risks that apply to churches of all sizes.

Notes (if requesting help):

Financial and Current Insurance

Typically completed by: Treasurer / Bookkeeper

39. Total Annual Income From All Operations: \$

How Do I Find This?

All sources - tithes, offerings, rental income, fundraisers, grants. Found on your annual financial report or most recent tax filing.

Notes (if requesting help):

40. Please list all current insurance policies (include carrier and coverage type):

Notes (if requesting help):

41. Current Insurance Information

The more complete the information you share, the more accurately competing carriers can quote your church. Here are the ways to provide it, in order of preference.

Full policy (preferred).

The complete policy shows carriers every coverage, limit, deductible, endorsement, and exclusion in one place. Email it to steve@crexchurch.com.

Declarations page (if the full policy isn't available).

The dec page is the summary at the front of your policy, usually the first page or two. Dec pages have been getting thinner, so if yours leaves coverages or endorsements out, send the full policy when you can. Premium amounts or internal notes may be redacted if preferred.

Canopy Connect (a fast way to pull your current details).

Available on the online form at crexchurch.com. Canopy is an independent, SOC 2 certified platform that runs a secure, read-only lookup of your carrier's system. It does not change your policy, generate a cancellation, or notify your current agent or carrier, and your login credentials are never shared with or visible to Crex. Canopy does not always return the full policy, so if anything is missing, follow up with your policy or dec page.

Loss runs (needed in every case).

Email five years of loss runs from your current agent to steve@crexchurch.com. Loss runs summarize your claims history and are required by every major carrier. Most agents send these within one to two business days of your request.

Current Carrier(s):

Coverage Types:

Notes (if requesting help):