



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. Primary Contact Name:

Phone: Email:

Notes (if requesting help):

3. 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):

4. 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):

5. 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):

6. 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):

7. Does the church operate a:

School?	Yes	No	Not Sure - Request Help
Preschool?	Yes	No	Not Sure - Request Help
Daycare?	Yes	No	Not Sure - Request Help

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

8. Number of Members:

Notes (if requesting help):

9. Number of Full-Time Employees:

Notes (if requesting help):

10. Number of Part-Time Employees:

Notes (if requesting help):

11. Number of Volunteers:

How Do I Find This?

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

Notes (if requesting help):

12. Number of Board Members:

Notes (if requesting help):

13. Number of Pastors:

Notes (if requesting help):

Building Systems and Safety

Typically completed by: Facilities Manager / Building Committee

14. 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):

15. 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):

16. 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):

17. Is the building sprinklered? Yes No Not Sure - Request Help

18. Is there a central alarm system installed? Yes No Not Sure - Request Help

19. 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):

20. If yes, are chemical fire suppression systems and in venting place? Yes No Not Sure - Request Help

How Do I Find This?

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

21. Are there any additional buildings or structures that need to be covered under this policy? Yes No Not Sure - Request Help

How Do I Find This?

Parsonage, storage buildings, detached fellowship halls, garages, pavilions, signage structures.

Notes (if requesting help):

Cemetery (If Applicable)

Typically completed by: Cemetery Board / Church Administrator

22. 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

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

Yes No Not Sure - Request Help

Notes (if requesting help):

24. 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):

25. 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):

26. 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.

Notes (if requesting help):

Financial and Insurance Details

Typically completed by: Treasurer / Bookkeeper

27. 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):

28. Current Insurance Information

Current insurance information can be provided through Canopy Connect on the online form at crexchurch.com, or by uploading your declarations page. If completing this PDF offline, please list your current carrier name(s) and coverage types below, or attach your declarations page when submitting.

Current Carrier(s):

Coverage Types:

Notes (if requesting help):

29. 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):