

Step 1: Person taking the call

Date: _____ Brokerage firm: _____ Entered by: _____

Step 2: The insured

Surname: _____ First name: _____

Street address: _____

Suburb/Rural area: _____ Town/City: _____

Home phone: _____ Work phone: _____

Mobile: _____ Email: _____

Bank Account No:

Step 3: Policy details

Policy number: _____ Policy wording: _____

Name on Policy: _____

Excess applicable: \$ _____ Premiums: Paid Unpaid

Step 4: Affirmation record (mandatory if no claim form to be completed)

The following statement has been read to the Insured: Yes No

“Before I can complete your claim, we will need you to understand and agree:

- ▶ Some details of your claim will be held on the Insurance Claims Register, an external database where insurers can access claims information.
- ▶ The information you have provided about your claim will be given to NZI. NZI can give information to, or get information from, others about you or your claim.
- ▶ If you give us information about someone else, you have their authority to disclose it.
- ▶ All personal information will be collected, used, stored and disclosed in accordance with NZI's privacy policy, which is available on NZI's website.
- ▶ Please answer all questions honestly. If you don't, your claim may not be paid, and your policy could be affected.

Do you understand and agree?”

Step 5: Insured details

Have you ever been refused insurance or had a policy cancelled or not renewed? Yes No

In the past 7 years, have you been convicted of a criminal offence? Yes No

If answered 'Yes', please provide details: _____

Step 6: General claim details

Date of loss: _____ Time of loss: _____

Description of event: _____

Description of item: _____

Any witnesses? Yes No

If 'Yes', please provide details: _____

Have you done anything to reduce or recover the loss or damage? Yes No

If 'Yes', please provide details: _____

For burglary, theft, unexplained loss or intentional damage claims only

Have the Police been advised? Yes No

If Police advised, their reference number: _____

Did the premises have a burglar alarm? Yes No

If 'Yes', was it on at the time of loss? _____

Step 7: Remainder of claim

Date purchased/age: _____

Hire purchase: Yes No

Property tenanted: Yes No

Insd confirms ownership: Yes No

Police file: Yes No

Quote/estimate: \$ _____

Who do you consider responsible? _____

Excess: Standard: _____ Imposed: _____ Voluntary: _____ Total excess: _____

Step 8: Any additional comments/information:



We are a member of the Insurance Council of NZ and adhere to the Fair Insurance Code. Further information on the Fair Insurance Code can be found at www.icnz.org.nz

