

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: General claim details

Date of loss: _____ Time of loss: _____

Description of Incident: _____

Description of item: _____

Date purchased/age: _____

Repairable? Yes No

If 'Yes', please enter details of damage, also attach repair quote: _____

- If not repairable, provide replacement like-for-like quote for NZI Claims' approval. A purchase order will be sent once quote approved.
- NZI Claims can send immediate request for like-for-like replacement (without need for written quote) to our preferred suppliers Visique, OPSM, Specsavers and Sunglass Hut.

Optometrist details: (if not NZI preferred) _____ Contact no: _____

Step 6: 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

