

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: Storm claim details

Date of Loss: _____ Time of loss: _____

Location of loss (if differs from above): _____

What damage has your property sustained? _____

What are your immediate needs? _____

Have you taken any immediate steps to remedy your situation? _____

Are you still able to live in the property? Yes No

If 'No', what is your present situation? (If not liveable, details why – e.g. roof blown off house)

Step 6: Any additional comments/information:

The below will assist you in explaining to clients what they can expect to happen next.

Please mark any e-mails as 'URGENT' (where immediate assistance is required). IAG's priority rating is 1-3 below, which can help convey timeframes to clients.

1. Urgent visit required - i.e. uninhabitable home, large structural damage, or large commercial loss.
2. Moderate – contact within 24 hours if moderate damage, however loss adjuster visit will be in a "couple of days".
3. Non-Urgent – "can wait" minor damage or can refer directly to builder.



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