

Client reference number (Office use only):

Claim Checklist



- 1. Were the terms and conditions fully explained to you by the advisor? Yes No Unsure

- 2. Were you told by the advisor that taking out the insurance Policy would increase your chances of getting the loan you needed? Yes No Unsure

- 3. Was it ever made clear that the insurance was optional? Yes No Unsure

- 4. Were you made aware of the total cost of the Policy? Yes No Unsure

- 5. Were you informed that you could potentially get a similar policy from an Independent source for a fraction of the cost? Yes No Unsure

- 6. Were you asked if you already had insurance that would provide suitable cover? Yes No Unsure

- 7. When you took the loan or credit card was the offer presented to you inclusive of Insurance without even discussing the subject of insurance? Yes No Unsure

- 8. Were you asked by the company salesman if you had any pre-existing medical conditions? (If yes go to Q-9, otherwise jump to Q-10) Yes No Unsure

- 9. Was it explained clearly that any pre-existing medical conditions were likely not to be covered by a new insurance policy? Yes No Unsure

- 10. When you took the insurance were you unemployed? Yes No Unsure

- 11. When you took the insurance were you retired from work? Yes No Unsure

- 12. When you took the insurance were you self-employed? Yes No Unsure

- 13. Did the Advisor compare the Payment Protection Insurance to any other product, perhaps one without life cover or a critical illness option? Yes No Unsure

- 14. Have you previously complained about this insurance policy? Yes No Unsure

Supplementary Information,

(Use this space if you want to add anything you believe to be relevant)

I/We believe the answers provided above are true and accurate:

Signature of Policyholder 1

Date

Signature of Policyholder 2

Date