

Thank you for providing us with the notification of your claim. The claim form is attached. Can you please read the following details before completing this form. Please feel free to contact us should you require any assistance

- 1) Please complete and return the attached form to our office. Attach all relevant original quotations, invoices, valuations and receipt of purchases (obtained for the repair/replacement of damaged property). Please also attach any letters of demand or other correspondence that you may receive/have received from a Third Party. Do not attach photocopies.
- 2) For claims involving loss/damage to your own property the appropriate authorities, i.e. Fire Brigade/Police, should be notified and every reasonable effort made to prevent further loss/damage. Damaged property, if any, should not be disposed of without permission of the Insurer or Assessor.
- 3) An assessor could be appointed and you will be advised if this action is taken.
  - Keep in contact with the assessor so the report can be provided to Insurers on time.
  - If there is any matter not receiving prompt attention you should call us immediately.
- 4) Please keep all supporting documentation for your claim for presentation to the Insurer or Assessor, such as original invoices, receipts, owners manual, photos, etc. Quotes from retailers or trade suppliers to replace/repair, itemising the precise nature of their quotation, eg size, type, model, age, hours and cost of labour, cost of parts.
- 5) Where personal injury/property damage to third parties is involved, offer assistance but **DO NOT ADMIT** liability. Advise the party involved to give written details of their claim against you for passing on to your Insurer.
- 6) Please refer to the claim form for more instructions for the management of your claim.

Should you require any further assistance, please contact us.

Paul Donnelly Insurance  
Brokers  
PO Box 97  
Berowra NSW 2081



Phone 02 9482 7422  
Fax 02 9482 7462  
Email pdib@pauldonnellybrokers.com.au

# Insurer:

## PROFESSIONAL INDEMNITY CLAIM FORM

The Issue of this Form is not an Admission of Liability by Insurer

Policy # :

Claim # : T / B / A

Please complete and return this claim form as soon as possible, so that your claim will receive prompt consideration by the Insurers.

### THE INSURED

Name \_\_\_\_\_ Mr, Mrs, Miss, Ms

Address \_\_\_\_\_

Post Code \_\_\_\_\_

Occupation \_\_\_\_\_

Phone Private \_\_\_\_\_ Business \_\_\_\_\_

Fax No. \_\_\_\_\_ Mobile \_\_\_\_\_

Email \_\_\_\_\_ Contact Name \_\_\_\_\_

### Are you registered for GST?

No  Yes  > What is your ABN?

	:		:		:		:		:		:		:		:		:		:		:
--	---	--	---	--	---	--	---	--	---	--	---	--	---	--	---	--	---	--	---	--	---

Have you claimed an input tax credit on the GST amount applicable to this policy?

No  Yes  > Is the amount claimed less than 100% No  Yes  > Specify amount

Of the GST applicable to the premium? claimed:  %

Are you entitled to claim an input tax credit for the repairs or replacement of the vehicle?

No  Yes  > Is the amount claimable No  Yes  > Specify amount

less than 100% claimed:  %

### THE CLAIMANT

Surname \_\_\_\_\_ Other Names \_\_\_\_\_ Mr, Mrs, Miss, Ms

Occupation \_\_\_\_\_

Address \_\_\_\_\_

Post Code \_\_\_\_\_

Phone Private \_\_\_\_\_ Business \_\_\_\_\_

Fax No. \_\_\_\_\_ Mobile \_\_\_\_\_

Contact Name \_\_\_\_\_

**PARTICULARS OF INCIDENT**

What was the date, from which the Insured performed the work, out of which the claim arises, or may arise from? \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

Please provide the name of the name of the person within the firm / company who actually performed the work or against whom the claim or possible claim is principally directed. \_\_\_\_\_

\_\_\_\_\_

On what date did the Insured first become aware of the matter complained of or the circumstance, which may give rise to a claim? \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

Was the first intimation verbal or in writing (if in writing attach copy) \_\_\_\_\_

If verbal, please give a "first person" account of the conversation \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

What are the Insured's comments on the Claimants allegations? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

What is the amount Claimed: \$ \_\_\_\_\_

What are the Insured's comments on the quantum of the claimant's claim and what is the Insured's estimate of its potential monetary liability to the claimant? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

What was the Insured retained (contracted) to do? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Was the Insured's retainer (contract of / for service(s)) evidence in writing? \_\_\_\_\_  
If so, please attach a copy. If not, please provide appropriate particulars \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Are there additional details about which you wish to advise, or which may be of interest to the Insurer, to provide Insurers with a better understanding of this matter? If so, please provide details (along with supporting documentation) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**To avoid unnecessary delay in processing your claim, it is important that you attach documentation to support :**

- **ownership of all property claimed, eg. Original invoices, owners manuals, photos, receipts, etc...**
- **the repair / replacement of your loss. Eg. Original invoices, receipts, etc... by trade suppliers / repairers – itemising the precise nature of their quotation or work under taken eg. Size, model, type, age, hours, cost of labour, parts, prices...**

## **PRIVACY**

The Privacy Act 1988 requires us to tell you that we as broker and the insurer collect your personal and sensitive information in order to calculate your loss and entitlements, determine the insurer's liability, compile data and handle claims.

When handling claims we and the insurer may have to disclose your personal and other information to third parties such as other insurers, reinsurers, loss adjusters, external claims data collectors, investigators and agents, or other parties as required by law.

Where you give us information about other persons you must have their consent to this and provide it on their behalf. If not, you must tell us.

You have the right to seek access to your personal information and to correct it at any time. Please contact us to advise if any changes are required.

## **DISPUTE RESOLUTION**

Disputes are not an everyday occurrence. However insurers provide an internal dispute resolution process should any dispute arise. Please feel free to ask for details.

If you are not satisfied with the outcome of that process, we will advise you how to contact the insurance industry's external independent complaints scheme (subject to eligibility).

## **DECLARATION**

I/We the insured do solemnly and sincerely declare that I/We have complied with the conditions and warranties (if any) of the policy and in no matter deliberately caused the said loss or damage or sought unjustly to benefit thereby by any fraud or misrepresentation and that the information shown on the form is true and the I/We have not concealed any information relating to this claim. I/We understand that this claim may be refused if the information is untrue, inaccurate or concealed.

Further it is understood and agreed that if any property claimed for is subsequently recovered in an undamaged condition I/We will immediately refund the company any sum which may have been paid to me/us in respect to such property. In the event of any property being recovered in damaged condition I/We will immediately hand the same over to the company for disposal as may be agreed.

I/We acknowledge that I/we have read and understood the Privacy Act information referred to above and consent to the collection, storage, use and disclosure of personal and sensitive information of all persons affected by this claim.

I/We acknowledge that if I/We do not agree to the collection of this personal and sensitive information, then the broker and the insurer will be unable to process my/our claim.

Insured's Signature \_\_\_\_\_ Date \_\_\_\_\_