

Client reference number (Office use only):

Claim Checklist



- 1. Were the terms and conditions fully explained to you by the advisor?

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

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

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

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

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

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

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

Yes	No	Unsure
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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