

AUSTRALIAN INSURANCE SERVICES PTY LTD – FACT FINDER – DOMESTIC/LANDLORD

Date: _____ Time: _____

Advice Required: Specific General
 Source: Yellow Pages Counter Referred By: _____ Web Other

COMPLIANCE CHECKLIST

Quotes	New Business	Endorsements	Renewals
Read privacy	Written cover request	Fact Finder	Privacy Sent
Fact Finder	Interim C/N on file	SOA (verbal & written)	Did you remarket
FSG (verbal & written)	Invoiced	Cover request sent	FSG (verbal or written)
SOA (verbal & written)		Invoiced	PDS (verbal or written)
PDS (verbal & written)		Filed	SOA (verbal or written)
Filed			Invoiced
			Filed

Insured:	AIS is a green company - contact via email/hard copy?		
Date of Birth:	Over 55 & Retired: YES/NO		
Home Phone:	Work Phone:	Mobile:	Email:
Home address:	P/C:		Approx. Age:
Postal Address same as above <input type="checkbox"/> or:	P/C:		
Current Insurer:	Current Broker:	Expiry Date:	
Policy Cover: Defined Events <input type="checkbox"/>	Accidental Damage <input type="checkbox"/>	Landlords <input type="checkbox"/>	Prestige <input type="checkbox"/>

SUM INSURED

Building: \$	Size of Building:		
Specified Contents in the Home: YES/NO (i.e. pictures, works of art, collections, etc.)	Contents: \$		
Item	\$	Item	\$
Total:			
Specified Valuables outside the Home: YES/NO			
Description:			Value
1.			
2.			
3.			
Unspecified Items: YES/NO	Sum Insured: \$		
Limit any one item \$			Total: \$
Domestic Workers: YES/NO	Number of workers:		
Landlords Insurance: Weekly Rental: \$	Malicious Damage by Tenant: YES/NO	Tenant Default: YES/NO	

INSURED PROPERTY DETAILS

Dwelling Type: Home <input type="checkbox"/> Holiday Home <input type="checkbox"/> Home Unit <input type="checkbox"/> Town House <input type="checkbox"/> Duplex <input type="checkbox"/> Flat <input type="checkbox"/>
Occupant Type: Client <input type="checkbox"/> Tenant <input type="checkbox"/> Other: _____
Construction: Double Brick <input type="checkbox"/> Brick Veneer <input type="checkbox"/> Concrete <input type="checkbox"/> Fibro <input type="checkbox"/> Metal <input type="checkbox"/> Wood <input type="checkbox"/>
Fire Protection? Does this give a discount – if not delete.

BURGLARY PROTECTION

Deadlocks on all external doors	YES/NO	Back to Base Alarm	YES/NO
Keyed window locks on all windows	YES/NO	Local Alarm System	YES/NO
Bars or grills on all accessible windows	YES/NO	If Rural how many acres and only Domestic Use?	YES/NO
Is the property used for Business use? If YES what type of Business?	YES/NO	Is the property occupied?	YES/NO
Will the home be unoccupied more than 60 days?	YES/NO		

INTERESTED PARTIES

Mortgage	Name	
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Has any insurer in respect of any insurance policy held by you, your partner:	
(a) Refused to renew/ cancelled or terminated a policy?	YES/NO
(b) Refused a claim or required an increased premium under the policy?	YES/NO
(c) Imposed special conditions under the policy?	YES/NO
(d) Have you been convicted any criminal offence or been declared bankrupt?	YES/NO
(e) Have you had any Claims in the past 5 years?	YES/NO
If YES to any of the above, please give details below:	

NOTE: REFER CLIENT TO BUILDING COST ESTIMATOR IF UNSURE OF SETTING SUMS INSURED.

Duty of Disclosure:

Is there any additional information or detail of which you are aware and which may assist us to better assess the nature of the risks? YES/NO
 If YES, please provide details:

BROKER NOTES/WORK ORDER