

PROFESSIONAL RISK (CLAIMS MADE POLICIES) INSURANCE CLAIMS CHECKLIST

Checklist of information and items that you will need when making a Professional Risks Insurance claim. We hope you find this list helpful.

Policy Number

Insured name (as per policy)

Risk address

GST details (ABN & ITC)

Date you first become aware of such claim or circumstance.

If the first intimation of a claim was in writing, please attach a copy. If No, please provide a "first person" account.

Detail the nature of the claim or circumstance that may give rise to a claim.

If your contract/retainer for services evidenced in writing, provide a copy to your insurer.

Details of when you performed the work out of which the claim arises or may arise.

Provide any additional background information that may assist in our understanding of this matter.

Provide your opinion on the amount claimed or best estimate of the claim or potential claim.

Third party details (if applicable):

- Name
- Address
- Contact number
- Details of allegation(s)
- Supporting documentation (eg. written demands, correspondence)

Witness details (if applicable)

- Name
- Company Name
- Address
- Contact Number

Police details (if applicable)

Whatever the claim type, you must make sure you notify your claim to your insurer or insurance broker as soon as possible and gather all relevant information at the time of the incident (such as third party details and/or witness details).

It is important that all claims are settled quickly and fairly so as to minimize any disruption to your business. Completing a claim form (if applicable) immediately, or as soon as practicable and submitting the details to your insurer or insurance broker means your claim can be actioned quickly and efficiently and minimizing the impact to you

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