

Data Protection

During this meeting, we will complete a detailed Fact Find to enable appropriate advice to be given to your GI needs. We will process all information in accordance with the Data Protection Act 1998 and it will be treated as private and confidential within the Premier Financial Group. The only exceptions to this will be when the law requires us to disclose information or, with your consent, where disclosure is necessary when arranging or servicing your protection contracts. To fulfill our regulatory obligations, we will retain copies of your records for no longer than is necessary or for the duration of the contract. You have the right to inspect these records at any time. We may make a charge of up to £20 to provide your records.

Name of Adviser:	
Source Of Lead:	

Date of first meeting:	
Date IDD presented:	

Applicants details

Full Name & Title		
Date Of Birth		
Landline telephone No.	Home / work	Home / work
Mobile No.		
Email:		

	Existing Cover	New Cover
Address postcode		
Property Type	Flat / terrace / Semi D House / Det House Semi D Bungalow / Det Bungalow	Flat / terrace / Semi D House / Det House Semi D Bungalow / Det Bungalow
No of Bedrooms		
Year Built		
Type Of Cover	Bldg & Conts / Bldgs Only / Conts Only Accidental damage? Bldgs / Conts	Bldg & Conts / Bldgs Only / Conts Only Accidental damage? Bldgs / Conts
Level of cover	Buildings: £ _____ Contents: £ _____	Buildings: £ _____ Contents: £ _____
Personal Possessions cover required?	Yes / No	Yes / No
Home emergency cover required	Yes / No	Yes / No
Legal Expenses Cover required?	Yes / No	Yes / No
prepared to pay an Policy Excess?	Standard / 50 / 100 / 150 / 250 / 500	Standard / 50 / 100 / 150 / 250 / 500
First Time Buyer?	Yes / No	
No of years No Claims	Years	

Is the Property built in brick or stone with a slate or tiled roof	Yes / No
Will the property be permanently occupied only by you and/or your family?	Yes / No
Does the property have signs of, or has it ever had any damage caused to it by Landslip; Subsidence or Heave?	Yes / No
Have you or any of your family received a police caution in the last 5 years or any conviction for an offence other than for driving or had Insurance cancelled, declined or declared void?	Yes / No
For the cover required have you or any of your family made any claim in the last 5 years?	Yes / No
Is your property to be left unoccupied for a total of more than 60 days in a row?	Yes / No
Is your property used for business or professional purposes other than clerical work undertaken by you or your family?	Yes / No

Ancillary Services

Do you currently have any pension provisions for your retirement?	Yes / no
Are you confident that this will provide you with the income you desire in retirement?	Yes / no
Do you wish to receive pension advice?	Yes / no
Do you currently make regular savings?	Yes / no
Do you currently have any cash deposits that you don't need to access in the short term?	Yes / no
Do you wish to receive savings & investment advice?	Yes / no
Do you have a valid will?	Yes / no
If yes, has it been reviewed in the last three years or has there been a change in your circumstances since you completed it?	Yes / no
Do you wish to receive advice on making or updating your Will?	Yes / no
Are there any other insurance you would like us to comment on? Business related insurances, friends or relatives Insurances, etc.	Yes / no

Details of the policy this replaces (if applicable) and any additional benefits which you will be losing. ie less cover, taking off acc. damage etc. and why.	
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Declaration:

If you have an existing contract it should not be discontinued until such time as you have received written notification from the recommended Provider that the new policy is on risk.

It is your responsibility to discontinue any previous contracts and cancel premiums at the appropriate time. The information I/we have provided is accurate and I/we understand the advice given to us by Premier Mortgages & Protection will be based on the information supplied herein.

we prefer our data be used only by Premier Financial Group Ltd members for no other than the purpose of product and policy updates.

Client Signature(s) date