

Make a Claim Checklist

For all Claims

- Policy number (if handy)
- Your full name and contact details
- Date and details of the event
- Supporting documents (e.g., notes, timelines, receipts)

Terminal Illness / Serious Illness (if applicable to your policy)

- Medical specialist reports confirming diagnosis and prognosis
- Test results and referral letters
- Employer statement if work capacity is affected

Health / Medical

- GP/specialist consultation notes and referrals
- Hospital admission/discharge summaries
- Invoices, receipts, and treatment plans
- Prior approval (pre-approval) confirmation, if obtained

Life Insurance (Death Benefit)

- Death certificate (when available)
- Medical certificate or coroner's report (if applicable)
- Proof of identity and relationship (for beneficiaries)
- Bank account details for payment

Income Protection / Mortgage/Expense Cover

- Employer confirmation of leave/salary details
- Medical certificate stating diagnosis and time off work
- Pay slips, IRD statements, or financials (if self-employed)
- Bank account details for benefit payments

Notes
