

Pleasurecraft / Boat Fact Finder



Sunshine Coast
Phone 1800 072 114
North & Central Queensland
Phone 1800 629 701
www.steelpacific.com.au

Date: _____

Brokers please note: this form should be discussed with your client as a Fact Finder and then reviewed by yourself when providing this information to an Insurer to ensure coverage and sums insured are appropriate.

Download and Save this file to your computer before completing.
This file is an interactive PDF and will let you type data into the form and save it.

Advice Required Specific General
Source Yellow Pages Counter Internet Referred by: _____

CLIENT GENERAL INFORMATION

Client Name _____
Contact Date _____ Client Code _____
Address _____ Postcode _____
Phone (Business) _____ Fax _____
Mobile Phone _____ Email _____
Are you willing to accept all correspondence relating to your insurance via email? Yes No
If 'Yes' please confirm email details correct.
Website(s) www. _____ www. _____
Mooring Address _____ Postcode _____
Type of Mooring Jetty Piling Penned Marina
Boat Use Private Competitive Racing Hire & Charter

TYPE OF INSURANCE - DETAILS

Cover Type Market Value TPPD Agreed Value (Valuation Required)
Description _____
Name _____
Year / Make / Model _____
Hull Type _____
Length _____ metres or _____ feet
Maximum Speed _____ knots
Mast / Spars / Sails _____
Accessories _____
Contents / Equipment _____ including / excluding fishing gear
Boat License No _____
Motor Brand _____ Year _____ Serial No. _____
Motor Type Inboard Outboard Mount
Horse Power _____ Fuel Type Petrol Diesel
Purchase Price Hull \$ _____ Motor \$ _____
Current Sum Insured \$ _____

Trailer Details Registration No. _____ VIN _____
 Year _____ Make _____
 Length _____ Model _____
 Purchase Price \$ _____

Liability Limit \$5,000,000 \$10,000,000 Other \$ _____

Boat Stored Overnight Carport Driveway Garage Marina
 Other _____

Cruising Limits Inland and coastal waters including Tasmania
 State Waters up to 50 Nautical Miles offshore
 Other _____

Options

Details

Any Waterskiing Activities? Yes No _____
 Boating Association member? Yes No _____
 Land Transit Cover? Yes No _____
 Marine Dealer Padlocked? Yes No _____
 Finance? Yes No _____

Other Client Specific Needs or Requests _____

SAIL BOATS ONLY

Mast, Spars, or Sails Make _____
 Running backstays Yes No Carbon Mast Yes No
 Inline Spreaders 2 or more Yes No Rod Rigged Yes No
 Sweepback Spreaders 3 or more Yes No Age of rig _____ Years

CLAIMS HISTORY

Date	Details	Insurer	Cost
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____

QUOTES OBTAINED

Underwriter	Via	Premium	Excess
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____

OTHER DISCUSSION NOTES OR RECOMMENDATIONS

DUTY OF DISCLOSURE

In the past five (5) years, have you or any person to be insured under this policy, or your employees had any claims? Yes No

If 'Yes', specify: _____

In the past (5) years, have your or any person to be insured under this policy, or your employees been convicted of a driving offence? Yes No

If 'Yes', specify: _____

In the past five (5) years, have you or any person to be insured under this policy, been convicted of a criminal offence? Yes No

If 'Yes', specify: _____

Have you, or any person to be insured under this policy, ever been declared bankrupt or entered into insolvency? Yes No

If 'Yes', specify: _____

Has an insurance company ever declined to accept insurance from you, cancelled a policy other than by your request or declined to renew a policy held by you? Yes No

If 'Yes', specify: _____

BROKER ONLY SECTION

Most Important Features

Rank which is most important to the client
(in the order of importance, 1 being most important).

- _____ Price of the Insurance;
- _____ Lower Excess;
- _____ The Insurer's Claim Paying Record / Service;
- _____ The Insurer's Credit Rating / Financial Strength;
- _____ Australian Insurer;
- _____ Other — Insert details of Other: _____

Best Interests Assessment

Will the client be better off with a new policy? Yes No

If 'Yes', detail why the client is better off: _____

Name (Print) _____ Signature _____ Date _____