

Personal / Business Effects, Money and Documents Claim Form



Please complete this claim fully and return to us by returning your completed form to:

ERGO IAS Services,
Unit 6 Birch House,
Ransom Wood Business Park,
Southwell Road West,
Mansfield,
NG21 0HJ

Or you can scan and send your completed form, alongside your supporting documentation, to enquiries@ergo-ias.co.uk.

Guide to Making a Claim

Below is a list of documents which need to be provided as supplementary evidence to support your claim. Please note the list is not exhaustive and we may ask for more information.

FOR ALL CLAIMS

1. Your policy certificate.
2. Your booking document(s) showing the total cost of the holiday.
3. Travel tickets (airline / ferry / coach etc.).
4. Your travel itinerary.
5. A photocopy of your passport page showing your photograph, name and date of birth.
6. Documents to support any discount given to you for your travel arrangements.

PERSONAL EFFECTS / MONEY

1. A police or couriers report as stated within your policy wording. Please refer to your policy wording for clarification.
2. For money claims, currency conversion slips/copy of bank/building society statements or a letter from your bank confirming withdrawal of funds prior to the trip.
3. For personal effects claims, all original invoices, receipts or repair / replacement quotes to this form. Proof of ownership is required for stolen items, for example purchase invoices, receipts, photos.
4. If relevant, the Property Irregularity Report issued by the carrier, ticket and baggage tags.
5. Please keep all damaged items. These may be required for inspection by us.
6. Receipts for any emergency items purchased.

Personal details

Title	Mr	Mrs	Miss	Ms	Other
Family name					First name
Date of birth					<i>DD/MM/YYYY</i>
Address					
					Post code
Daytime tel no.					Evening tel no.
Email address					Occupation

Policy details

Company name			If applicable
Policy number		Date of issue	<i>DD/MM/YYYY</i>
Date of booking	<i>DD/MM/YYYY</i>	Destination	
Date of travel	<i>DD/MM/YYYY</i>	Date of return	<i>DD/MM/YYYY</i>
Travel agent		Tour operator	

Claim details

Date of incident	<i>DD/MM/YYYY</i>	Time
Place of incident		
Full details of how loss / damage occurred		

Personal / Business Effects, Money and Documents - Claim Form

Which authorities
were notified

Police

Airline

Holiday rep

Shipping company

Other

If other please provide details

Date of repor

DD/MM/YYYY Time

Please provide the original claims report provided by the authority above

Have you received a cash advance from any source?

Yes

No

If 'Yes' please state amount

Received from

Home contents insurer

Address

Post code

Telephone number

Policy number

Information we need from you for possible recovery opportunities

Your Travel Policy has conditions attached whereby you must provide us with any information that assist any recovery actions. This is a standard practice in the insurance market and contributions made from other insurance cover serve to keep the costs of your premiums down. The information provided should not affect your renewal premiums or no claims discount.

Please answer the following questions and provide details as required. For questions that require a YES / NO response, please tick the appropriate boxes. Failure to do so may delay your claim.

1. Do you have a bank account?		Yes	No
A bank account you hold may offer Travel Insurance cover as part of the benefits. Under no circumstances will your bank account information be used other than to obtain a contribution from the Travel Insurance provider. This will not affect your bank account in any way.			
	Name of bank (e.g. HSBC)	Type of account	Account holder name
Bank Account			

2. Was a credit card or debit card used to pay all or part of the trip cost? (Certain credit or debit cards provide an element of travel cover)		Yes	No
	Card issuer	Type of card e.g. Visa	Cardholder name
Bank Account			

3. Do you have a Household Contents insurance policy? (Some household contents policies provide an element of travel cover)		Yes	No
	Name of Insurer	Policyholder name	Policy number
Bank Account			

4. Do you hold any Private Medical Insurance?		Yes	No
	Name of Insurer	Policyholder name	Policy number
Bank Account			

5. Do you consider anyone to blame for the incident?		Yes	No
If yes, please provide details.			

It is a condition of the policy and your responsibility to provide sufficient documentation to support your loss. Failure to provide the required documentation, including the details of any other insurances, will delay and may invalidate the claim.

Particulars of claim

Money and documents						
Owner	Item description (including make and model)	Place of purchase	Date of purchase	Original price paid	Wear, tear and depreciation deduction	Amount claimed

Please continue on a separate sheet if necessary.

Please ensure that in respect of all items being claimed for, you must provide proof of purchase. Estimates for replacement are not acceptable. We will, however, accept a certified copy of an original receipt.
You are also requested to forward original travel tickets, baggage tags, invoices etc. to verify your travel arrangements.

Previous claims

Have you ever made any previous claims of the type, and in respect of the type of property, being claimed for? Yes No

If 'Yes', please supply the following information:

Money and documents			
Date	Incident	Insurer	Reference

Claimants declaration and signature

1. I declare that all details and particulars given in respect of the claim(s) made herein constitute a true and accurate statement.
2. To the best of my knowledge and belief I have not omitted any material information which would affect the insurers assessment of this claim.
3. I confirm that where a claim or claims are made in respect of others, I have their full authority to act on their behalf. I also confirm that they have been advised that ERGO Travel Insurance Services Ltd (ETI) will not accept any liability if any payments are not distributed proportionately to the persons concerned.
4. I am aware that an insurance claim made in the knowledge that any element thereof is fraudulent is a criminal offence and that this will invalidate the policy and will render me liable to prosecution.
5. I consent to ETI:
 - a. recording, storing and using my personal data in an electronic record of this claim; and
 - b. sharing the record of this claim, including my personal data, with other insurers and interested parties as part of insurance industry anti-fraud initiatives; in accordance with the General Data Protection Regulation.

I have read and understand the declaration above and included the necessary documents to substantiate my claim.

Claimant(s) full name(s)

Clients signature

Date

DD/MM/YYYY

Full name of an authorised representative of the corporate policy holder (corporate and / or education group cover)

Signature of authorised representative

Date

DD/MM/YYYY

I / We authorise

Client's signature

to act on my behalf in this matter.

Date

DD/MM/YYYY

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Confidentiality and data protection

Consent

We will only use Your personal data when the law allows Us to. Most commonly We will use Your personal data under the following two circumstances:

1. When You gave explicit Consent for Your personal data, and that of others insured under Your Policy, to be collected and processed by Us in accordance with this Data Protection Notice.
2. Where We need to perform the contract which We are about to enter into, or have entered into with You.

How We use Your Personal Data

We use Your personal data for the purposes of providing You with insurance, handling claims and providing other services under Your Policy and any other related purposes (this may include underwriting decisions made via automated means). We also use Your personal data to offer renewal of Your Policy, for research or statistical purposes and to provide You with information, products or services that You request from Us or which We feel may interest You. We will also use Your personal data to safeguard against fraud and money laundering and to meet Our general legal or regulatory obligations.

We collect and process Your personal data in line with the General Data Protection Regulation and all other applicable Data Protection legislation. The Data Controller is ETI. For the purposes of handling claims the Data Processor is Insurance Administration Services Limited.

Special Categories of Personal Data

Some of the personal data You provide to Us may be more sensitive in nature and is treated as a Special Category of personal data. This could be information relating to health or criminal convictions, and may be required by Us for the specific purposes of underwriting or as part of the claims handling process. The provision of such data is conditional for Us to be able to provide insurance or manage a claim. Such data will only be used for the specific purposes as set out in this notice.

Sharing Your Personal Data

We will keep any information You have provided to Us confidential. However, You agree that We may share this information with Great Lakes Insurance SE, Great Lakes Insurance UK Limited and other companies within the ERGO Group and with third parties who perform services on Our behalf in administering Your Policy, handling claims and in providing other services under Your Policy. Please see Our Privacy Policy (<https://www.ergotravelinsurance.co.uk/privacy-statement>) for more details about how We will use Your information.

We will also share Your information if We are required to do so by law, if We are authorised to do so by You, where We need to share this information to prevent fraud.

We may transfer Your personal data outside of the European Economic Area ("EEA"). Where We transfer Your personal data outside of the EEA, We will ensure that it is treated securely and in accordance with all applicable Data Protection legislation.

Your Rights

You have the right to ask Us not to process Your personal data for marketing purposes, to see a copy of the personal information We hold about You, to have Your personal data deleted (subject to certain exemptions), to have any inaccurate or misleading data corrected or deleted, to ask Us to provide a copy of Your personal data to any controller and to lodge a complaint with the local data protection authority.

The above rights apply whether We hold Your personal data on paper or in electronic form.

Your personal data will not be kept for longer than is necessary. In most cases this will be for a period of seven years following the expiry of the insurance contract, or Our business relationship with You, unless We are required to retain the data for a longer period due to business, legal or regulatory requirements.

Further Information

Any queries relating to how We process Your personal data or requests relating to Your Personal Data Rights should be directed to:

Data Protection Officer, ETI, Afon House, Worthing Road, Horsham, RH12 1TL, United Kingdom

Email: dataprotectionofficer@ergo-travel.co.uk

Phone: +44 (0) 1403 788 510

Settlement by BACS

For your convenience and to offer an efficient smoother service, we would like to pay any claim settlement due directly into your bank account. Please provide ALL your details on this form as requested below, remembering to sign and date also.

If you do not wish to provide your bank details, any settlement due on your claim will be issued by cheque and may take a little longer to process.

You will receive an email from us to confirm when this payment has been made.

Your details	
Name of Claimant	
Email Address Where we will send confirmation of payment	

Bank account details	
Name of Payee This should be the same as held on the bank account	
Bank Name	
Bank Address inc. Country and Postcode	
Bank Account Number	
Sort Code	

If your bank account is held abroad, please also enter the following details:	
IBAN/BIC number	
Swift Code	

Signed

Date

DD/MM/YYYY

IMPORTANT: We do not accept liability for any errors due to the incorrect bank details being provided by you.

PLEASE CHECK ALL DETAILS PRIOR TO SUBMITTING YOUR CLAIM.