



Dear Sirs/Madam

Re: Insurance – ABC Body Corporate

As you are aware, XYZ Property Services have taken over the management of ABC Body Corporate with effect from 1 July 2021. My function within XYZ Property Services is **insurance administration** - dealing with all insurance matters where liaison with the brokers is concerned, non-advice giving and not providing intermediary services.

In this regard, please assist with the following so I may update my information:

1. Provide a copy of the latest policy schedules and policy wordings.
2. Confirm that policy premiums are up to date.
3. Provide me with a fresh debit order form so that I can have it signed and provide you with confirmed bank details to ensure that the debit is collected from the new bank account at month end.
4. Provide me with a record of the last written advice in respect of the policy as I need a record of advice for file in terms of FAIS legislation.
5. Provide me with the latest claims history reflecting all claims and, in particular, a history of geyser replacements so that this can be analysed.
6. Advise whether there are any pending claims, any claims not yet registered, or any claim intimations in respect of liability on file which we should be aware of.
7. Confirm your claims procedure (or call centre for following up) to avoid any prejudice at claims stage.
8. Please provide me with claim forms or any stationery I will require at claims stage.
9. Confirm if there are any additional policies besides the main buildings policy.
10. Point out any adverse conditions or restrictions imposed by the insurer on the policy.

Yours faithfully,

Joe Soap

Administrator