

Documents for a claim

What is usually needed for a life, health or accident claim.

Every insurer has its own claim form and may ask for something more. This list helps you gather early what is asked for almost every time.

01 For every claim

- ☐ The policy number
- ☐ The insurer's claim form, filled in and signed
- ☐ A copy of the claimant's ID card or passport
- ☐ The account details for the payment, as the form asks for them

02 Hospital and medical costs

- ☐ The hospital discharge report
- ☐ A medical report with the diagnosis
- ☐ Itemised invoices and receipts
- ☐ Prescriptions and test results related to the case
- ☐ The GESY referral, if there is one

03 Accident

- ☐ A short description: when, where and how it happened
- ☐ A medical report on the injury
- ☐ The police report, if the police were involved
- ☐ A certificate of incapacity for work, if you claim an allowance

04 Death of the insured person

- ☐ The death certificate
- ☐ A medical certificate of the cause of death
- ☐ The beneficiaries' ID documents

☐ If no beneficiaries were named, the inheritance or estate papers that will be asked for

Tell the insurer as early as you can: many policies have deadlines. Keep copies of everything you hand in. If you are my client, call me before you send the documents and we will go through them together.

Notes



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