



# Initial Claim Form

## Involuntary Unemployment

Please answer ALL relevant questions fully, not doing so could result in delays in processing your claim.

### SECTION A – Personal Details

Insured Name	<input type="text"/>	Date of Birth	<input type="text"/> / <input type="text"/> / <input type="text"/>
Residential Address	<input type="text"/> <small>Postcode</small>		
Postal Address	<input type="text"/> <small>Postcode</small>		
Telephone	<input type="text"/> (home)	<input type="text"/> (mobile)	
E-mail (for correspondence)	<input type="text"/>		

### SECTION B – Occupation Details

1. Name of Last Employer

Street Address  Postcode

Contact Numbers (phone)  Name of Contact Person

E-mail Address
2. What was your job title when you ceased employment?
3. (a) When did you cease employment?  /  /

(b) Was cessation of employment involuntary? ☐ Yes ☐ No

(c) Please state the reasons for cessation of employment. (If dismissed, please state reasons.)
4. (a) Was your employment ☐ Full-time ☐ Part-time ☐ Casual ☐ Contractor ☐ Seasonal ☐ Temporary

(b) If contractor, please provide the term of contract? From  /  /  To  /  /
5. How long have you been in that job?  Years  Months
6. How many hours per week, on average, did you work prior to ceasing work?
7. Have you returned to work? ☐ Yes – If 'Yes', please continue to question 8. ☐ No
8. (a) If you are working, when did you return to work?  /  /

(b) Name of Current Employer

Street Address  Postcode

Contact Numbers (phone)  Name of Contact Person

E-mail Address

## SECTION C – Vocational History

1. Please provide a detailed work history for the last 12 months (please attach a separate sheet if required or your resume).

Period of employment	Employer	Job title	Position description/Duties
/ / to / /			
/ / to / /			
/ / to / /			

## SECTION D – Other Claims

1. Have you previously made a claim against this policy? ☐ Yes ☐ No  
If 'Yes', please provide details.


## SECTION E – Checklist

1. ☐ I have fully completed this form, to ensure my claim is assessed promptly.
2. ☐ I have attached a certified copy of my: ☐ Driver's Licence or ☐ Passport or ☐ Birth Certificate
3. ☐ I have attached a copy of my cessation of employment letter.
4. ☐ I have attached a certified copy of the Statutory Declaration Form.
5. ☐ I have attached proof of registration with Centrelink or an approved employment agency within Australia.

## SECTION F – Declaration

### DECLARATION AND CONSENT

I declare that the information in this Claim Form is true, correct and complete. I understand and agree that if I make any false or fraudulent statements or fail to advise AIA Australia Limited of any relevant information regarding my claim, AIA Australia Limited may refuse to pay benefits and proceed to cancel my claim and/or my insurance cover.

I have read and consent to the handling, collection, use and disclosure of my personal and sensitive information in the manner described in the Privacy section of this form and the Privacy Policy on the AIA Australia website [www.aia.com.au](http://www.aia.com.au) as updated from time to time, including (without limitation) for the purposes of investigation, assessment and management of my claim and related purposes, and the collection and exchange of my personal and sensitive information from and with the following (where relevant):

- a. the life insured, policy owner or beneficiaries of my insurance policy;
- b. my representatives (including my financial adviser), employer and financial institution;
- c. other insurers (including workers' compensation insurers), insurance brokers and intermediaries and insurance and credit reference agencies;
- d. medical and health providers, including the ambulance service;
- e. AIA Australia's investigators, service providers, partners and reinsurers;
- f. regulatory and law enforcement agencies;
- g. the trustee and administrator of my superannuation fund; and
- h. other third parties assisting with the investigation, assessment and management of my claim.

I authorise my previous and current employer to provide AIA Australia Limited details of my employment history.

**I agree that a copy of this authorisation shall be considered as effective and valid as the original.**

Name of Life Insured (*please print*)

Signature of Life Insured

Date

	X	/ /
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# Certification of Copy Documents

## What is a certified copy?

A **certified copy** means a copy of the document that has been certified as a true copy of an original document by one of the following persons:

1. Any person who is enrolled on the roll of the Supreme Court of a State or Territory, or the High Court of Australia, as a legal practitioner;
2. Any person who is currently licensed or registered to practise in one of the following occupations in each State or Territory:
  - A. Chiropractor
  - B. Dentist
  - C. Legal practitioner
  - D. Medical practitioner
  - E. Nurse
  - F. Optometrist
  - G. Patent attorney
  - H. Pharmacist
  - I. Physiotherapist
  - J. Psychologist
  - K. Trade marks attorney
  - L. Veterinary surgeon,
3. Any person listed below:
  - A. Agent of the Australian Postal Corporation who is in charge of an office supplying postal services to the public
  - B. Australian Consular Officer or Australian Diplomatic Officer (within the meaning of the *Consular Fees Act 1955*)
  - C. Bailiff
  - D. Bank officer with 5 or more continuous years of service
  - E. Building society officer with 5 or more years of continuous service
  - F. Chief executive officer of a Commonwealth court
  - G. Clerk of a court
  - H. Commissioner for Affidavits
  - I. Commissioner for Declarations
  - J. Credit union officer with 5 or more years of continuous service
  - K. Employee of the Australian Trade Commission who is:
    - in a country or place outside Australia; and
    - authorised under paragraph 3 (d) of the *Consular Fees Act 1955*; and
    - exercising his or her function in that place
  - L. Employee of the Commonwealth who is:
    - in a country or place outside Australia; and
    - authorised under paragraph 3 (c) of the *Consular Fees Act 1955*; and
    - exercising his or her function in that place
  - M. Fellow of the National Tax Accountants' Association
  - N. Finance company officer with 5 or more years of continuous service
  - O. Holder of a statutory office not specified in another item in this Part
  - P. Judge of a court
  - Q. Justice of the Peace
  - R. Magistrate
  - S. Marriage celebrant registered under Subdivision C of Division 1 of Part IV of the Marriage Act (Cth) 1961
  - T. Master of a court
  - U. Member of Chartered Secretaries Australia
  - V. Member of Engineers Australia, other than at the grade of student
  - W. Member of the Association of Taxation and Management Accountants
  - X. Member of the Australian Defence Force who is:
    - an officer; or
    - a non-commissioned officer within the meaning of the *Defence Force Discipline Act 1982* with 5 or more years of continuous service; or
    - a warrant officer within the meaning of that Act
  - Y. Member of the Institute of Chartered Accountants in Australia, the Australian Society of Certified Practising Accountants or the National Institute of Accountants
  - Z. Member of:
    - the Parliament of the Commonwealth; or
    - the Parliament of a State; or
    - a Territory legislature; or
    - a local government authority of a State or Territory
  - AA. Minister of religion registered under Subdivision A of Division 1 of Part IV of the Marriage Act (Cth) 1961
  - BB. Notary public
  - CC. Permanent employee of the Australian Postal Corporation with 5 or more years of continuous service who is employed in an office supplying postal services to the public
  - DD. Permanent employee of:
    - the Commonwealth or a Commonwealth authority; or
    - a State or Territory or a State or Territory authority; or
    - a local government authority;with 5 or more years of continuous service who is not specified in another item in this Part
  - EE. Person before whom a statutory declaration may be made under the law of the State or Territory in which the declaration is made
  - FF. Police officer
  - GG. Registrar, or Deputy Registrar, of a court
  - HH. Senior Executive Service employee of:
    - the Commonwealth or a Commonwealth authority; or
    - a State or Territory or a State or Territory authority
  - II. Sheriff
  - JJ. Sheriff's officer
  - KK. Teacher employed on a full-time basis (school or tertiary education)
  - LL. Member of the Australasian Institute of Mining and Metallurgy

## The certifier is to include the following statement of certification on each page of the copy document:

1. The certifier's full name;
2. By reference to the listing above, a statement as to which category of authorised certifier the person is;
3. Either of the following statements:
  - a. 'I certify that this page is a true and correct copy of the original document which I have sighted'; or
  - b. 'I certify this is a true and correct copy of the original document which I have sighted' (for use where there is only a single page); and
4. The date the copy document is certified.



# Privacy

This section summarises key information in the AIA Australia Privacy Policy, which may be updated from time to time. For further information, please review the most up to date full version of the AIA Australia Privacy Policy on AIA Australia's website at [www.aia.com.au](http://www.aia.com.au).

AIA Australia Limited is part of the AIA Group. Your privacy is important to us and AIA Australia Limited is bound by the privacy principles which apply to private sector organisations under the Privacy Act, and other laws which protect your privacy. AIA Australia Limited, AIA Financial Services Limited, AIA Group and their related bodies corporate and joint venture partners (together referred to as "AIA Australia", "we", "us" and "our") provide you the following notification and information about our Privacy Policy and your rights.

## Why we collect personal information

We collect, use and disclose personal information (including sensitive information) for purposes set out in our Privacy Policy, including to process your applications, enquiries and requests in relation to insurance and other products, for underwriting and reinsurance purposes, to administer, assess and manage your insurance and other products, including claims, and to provide, manage and improve our products and services. We may not be able to do these things without your personal information. We may also collect, use and disclose personal information to understand your needs, interests and behaviour, personalise our dealings with you, to verify your identity, authority to act on behalf of a customer and personal information, maintain and update our records, manage our relationship with you, comply with local and foreign laws and regulatory requests, detect, manage and deal with improper conduct and commercial risks and for reporting and research purposes. Where you agree or we are otherwise permitted by law, we may also notify you of offers and other information about products or services we think may interest you. If you do not wish to receive these direct marketing communications, you may indicate this where prompted or by contacting us as set out in our Privacy Policy.

## How we collect, use and disclose personal information

We may collect your personal information from various sources including forms you submit and our records about your use of our products and services and dealings with us, including any telephone, email and online interactions. We may also collect your information from public sources, social media and from the parties described in our Privacy Policy. We are required or authorised to collect personal information under various laws including the Life Insurance Act, Insurance Contracts Act, Corporations Act and other laws set out in our Privacy Policy. Where you provide us with personal information about someone else, you must have their consent to provide their personal information to us in the manner described in our Privacy Policy.

We may collect your personal information from, and exchange your personal information with, our affiliates and third parties, including the life insured, policy owner or beneficiaries of your insurance policy, our service providers, your representatives (including your financial adviser), the trustee and administrator of a superannuation fund, your employer or bank, health providers, partners used in our activities or business initiatives, reinsurers, insurance brokers and intermediaries, regulatory and law enforcement agencies, and other parties as described in our Privacy Policy. Parties to whom we disclose personal information may be located in Australia, South Africa, the US, Europe, Asia and other countries including those set out in our Privacy Policy and you acknowledge that Australian Privacy Principle 8.1 (which relates to cross-border disclosures) will not apply to the disclosure, we will not be accountable for those overseas parties under the Privacy Act and you may not be able to seek redress under the Privacy Act.

Where we provide your personal information to a third party, the third party may collect, use and disclose your personal information in accordance with their own privacy policy and procedures. These may be different to those of AIA Australia.

## Other important information

By providing information to us or your adviser (and the licensed dealer or broker they represent), the trustee or administrator of a superannuation fund, or other representative or intermediary, submitting or continuing with a form or claim, or otherwise interacting or continuing your relationship with us, you confirm that you agree and consent to the collection, use (including holding and storage), disclosure and handling of personal information (including sensitive information) in the manner described in the most up to date version of our Privacy Policy on our website and that you have been notified of the matters set out in the AIA Australia Privacy Policy before providing personal information to us. You agree that we may not issue a separate notice each time personal information is collected.

You must obtain and read the most up to date version of the AIA Australia Privacy Policy from our website at [www.aia.com.au](http://www.aia.com.au) or by contacting us on 1800 333 613 to obtain a copy. You have the right to access the personal information we hold about you, and can request the correction of your personal data if it is inaccurate, incomplete or out of date. Requests for access or correction can be directed to us using the details in the 'Contact us' section below. Our Privacy Policy provides more detail about our collection, use (including handling and storage), disclosure of personal information and how you can access and correct your personal information, make a privacy related complaint and how we will deal with that complaint, and your opt-out rights.

For the avoidance of doubt, the Privacy Policy applicable to the management and handling of personal information will be the most current version published at [www.aia.com.au](http://www.aia.com.au) shall supersede and replace all previous Privacy Policies and/or Privacy Statements and privacy summaries that you may receive or access, including but not limited to those contained in or referred to in any telephone recordings and calls, applications, underwriting and claim forms, Product Disclosure Statements and other insurance and disclosure statements and documentation.

## Contact us

If you have any questions or concerns about your personal information, please contact us as set out below:

The Compliance Manager  
AIA Australia Limited  
PO Box 6111  
St Kilda Road Central, VIC 8008  
Phone 1800 333 613