

Landlord Legal Expenses / Income Protection / Rent & Legal Protection Claim Form



Important: Claims for policies which include Rental Protection cover (Ultra Landlord and Landlord's Rent and Legal Protection Insurance) must be notified within 30 days of the date that you first become aware of problems.

Claims for Landlord's Legal Expenses Insurance must be notified within 60 days of the date that you first become aware of problems.

If you need any assistance in completion of this form please contact Home and Legacy Claims on 0844 893 8360.

Category of claim(s) for which this form is being completed:

Landlord Legal Expenses
Income Protection / Rent & Legal Protection

Section 1 – General

Claim No.

Policy Number _____ Insured Name(s) _____

Correspondence Address _____

Town / City _____ Postcode _____ Country _____

Work Tel. No. _____ Mobile Tel. No. _____ Home Tel. No. _____

Email (for correspondence related to this insurance) _____

Are you registered for VAT? YES NO

If YES, please advise VAT number and status _____

Was your insurance arranged through an intermediary? YES NO

If YES, please provide their name and contact details below

Intermediary's Name _____ Correspondence Address _____

_____ Town / City _____ Postcode _____

Intermediary's Tel. No. _____ Intermediary's Email _____

How was the premium paid? Annually Instalments

Is your property fully managed by a Property Managing Agent or Letting Agent? YES NO

If YES, please give the Agent's contact details and the services provided

Managing Agent's Name _____

Address _____ Town / City _____ Postcode _____

Managing Agent's Tel. No. _____ Managing Agent's Email _____

What services are provided by your Property Managing Agent or Letting Agent?

Tenant Finding Only Tenant Finding and Rent Collection Full Management Other

If 'Other' please give details below

If applicable what Tenancy Deposit scheme is used?

The Deposit Protection Service Tenancy Deposit Solutions Ltd The Tenancy Deposit Scheme

What is the amount of tenancy deposit collected: £ _____

If the claim is accepted and settlement is made by cheque, to whom should it be made payable?

If you would prefer a BACS payment, please provide details _____

Please check that you have enclosed all relevant supporting documentation as detailed below, before returning the completed claim form to: Claims Department, Home and Legacy Insurance Services Limited, 500 Avebury Boulevard, Lower Ground Floor, Milton Keynes, Buckinghamshire, MK9 2LA, or by fax to: 0844 893 8387 or by email to claimsteam@homeandlegacy.co.uk

Section 2 – Tenancy details

What type of Tenancy Agreement is in place?

Assured Shorthold Company let Short Assured Other

If 'Other' please specify _____

What is the period of the Tenancy Agreement? From _____ **To** _____

What is the monthly rent? £ _____

On what day/date is the rent normally due? (e.g. first day of the month) _____ / _____ / _____

Is part or all of the monthly rent is paid by Housing Benefit/Local Authority Allowance? YES NO

Please give the names of all the tenants who are named on the Tenancy Agreement?

Do any of the tenants have a guarantor? YES NO

If YES, provide the guarantor's details below

Guarantors Name _____

Address _____ Town / City _____ Postcode _____

Work Tel. No. _____ Mobile Tel. No. _____ Home Tel. No. _____

Email _____

Section 3 – Details of the claim

What date did you first become aware of problems? _____ / _____ / _____

Has/Have the tenant(s) vacated the property? YES NO

If YES, give the date they vacated Date vacated _____ / _____ / _____

Do you have any knowledge as to the current whereabouts of the tenant(s), their place of work, or any other information you believe may assist? YES NO

If YES, please detail it below

Tenant's forwarding/last address (if known):

Address _____ Town / City _____ Postcode _____

Work Tel. No. _____ Mobile Tel. No. _____ Home Tel. No. _____

Email _____

Name and address of tenant's last known place of work

Employer's Name _____

Address _____ Town / City _____ Postcode _____

Employer's Tel. No. _____ Employer's Fax No. _____

Email _____

Have any attempts been made to re-let the property YES NO

If YES and the property has been successfully re-let, on what date was it re-let and for what rent?

Date re-let _____ / _____ / _____ Monthly Rent £ _____

Declaration

I/We declare that we were not aware at the start of the insurance or renewal of this insurance that this claim, the details of which are set out above, was likely to arise.

I/We or the Managing Agent appointed by me/us obtained consent from the tenant(s) and their guarantor(s) (if applicable) before letting the property, for any personal information held about them (including any forwarding addresses made known to me/us at the end of the Tenancy Agreement or upon vacating the property) to be disclosed to other parties in the event of rental default, or following a breach of any of the Terms and Conditions of the Tenancy Agreement, in order to trace their whereabouts, or to try to recover any monies that are due to be paid by them to me/us.

Duty of Disclosure

You are reminded that you must provide all material information likely to influence your claim or the cover provided under your policy. If you have any doubts as to whether a fact is material it should be disclosed. Failure to disclose all material facts may invalidate your policy or may result in it not operating fully.

Data Protection

The data you have provided will be used to process your claim and may be passed to other organisations involved

Name(s) _____

Signature _____ Date ____ / ____ / ____

Signature _____ Date ____ / ____ / ____

in processing your claim for example to your insurer, legal representatives or to fraud detection and prevention agencies. This may include being sent, in confidence, for processing outside of the European Economic Area. The information provided to other parties will be treated in confidence and in compliance with the Data Protection Act 1998. You may have the right to apply for details of the information we hold (for which we may charge a small fee). By signing this form you consent to such use of your personal data.

Claims and Underwriting Exchange

Insurers and their agents share information with each other to prevent fraudulent claims and for underwriting purposes via the Claims and Underwriting Exchange register, operated by Insurance Database Services Limited. The information you supply on this form, together with any other information you supply to us in connection with your insurance or relating to the claim will be provided to participants.

Your Insurer and Home and Legacy are authorised and regulated by the Financial Services Authority. This can be checked on the FSA website at www.fsa.gov.uk/register/ or by contacting them on 0845 606 1234.

Please check that you have enclosed all relevant supporting documentation as detailed below, before returning the completed claim form to Home and Legacy Insurance Services Limited, 500 Avebury Boulevard, Lower Ground Floor, Milton Keynes, Buckinghamshire, MK9 2LA or by Fax to: 0844 893 8387 or by email to claimsteam@homeandlegacy.co.uk

Check List – Have you enclosed the following?

For your claim to be dealt with quickly you must enclose relevant documents. If any required documents are missing, please provide the reason and state when you believe they will be available. Failure to provide this information may prejudice your claim.

- Copy of the Tenancy Application
- Copy of any formal Notices served in connection with gaining possession of the property
- Copy of the references obtained for the tenant(s) and their guarantors and any supporting documentation such as proof of residency you obtained for the tenant(s) and guarantors (if any) before the start of the Tenancy Agreement
- Initial Property Inventory and Condition Report
- Confirmation that the deposit has been deposited with a Tenancy Deposit Scheme (if required) and evidence to show that you have complied with the requirements of the Tenancy Deposit Scheme
- Final Inspection Report
- Copy of the Tenancy Agreement
- Any recent Routine Inspection Reports
- Copy of any Guarantors covenants
- A copy of the Rent Schedule detailing the rent due and the dates that any rental payments were received
- If the property is “fully managed”, copy of current Management Authority Agreement
- Copies of any relevant correspondence with the tenant(s)
- If your claim relates to an event which arises within the first thirty (30) days of the cover start date, where there was an existing tenancy in place, a copy of your previous Insurance Certificate or Schedule.