

# Landlord's Rent & Legal Protection/Legal Expenses



## CLAIM FORM

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

Claims for the Landlord's Legal Expenses policy 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 0344 893 8360.**

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

Landlord's Legal Expenses

Ultra Landlord Rent Default Protection / Landlord's 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  Monthly

#### 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

Agent's Name

Address  Town / City  Postcode

Agent's Tel. No.  Agent's Email

#### What services are provided by your Agent?

Tenant Finding Only  Tenant Finding and Rent Collection  Full Management  Other

If 'Other' please give details below

#### What Tenancy Deposit scheme is used?

What is the amount of tenancy deposit collected: £

If your claim is accepted our preferred method of settlement is by way of electronic transfer using BACS. Please provide your bank details.

## 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

Guarantor's 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 £ \_\_\_\_\_

## SECTION 3 – DETAILS OF THE CLAIM (CONT)

### Rent / Rent recovery

On what date did the unpaid rent first become due? \_\_\_\_\_

What are the current rent arrears? £ \_\_\_\_\_

Do you think the debt could be recovered from the tenant (over time if necessary)?

YES

NO

**If the property is occupied by squatters or other unauthorised occupants or there is damage to the property**

Please give details

## SECTION 4 – ADDITIONAL INFORMATION

Please provide any other information which could help the insurers in the handling of the claim or recovery/pursuit of any party.

## IMPORTANT NOTE

The insurer has established a panel of solicitors who are experienced in landlord and tenant matters and reserve the right to use a firm from this panel. The panel has demonstrated an ability to conduct such matters successfully and at a reasonable cost, and you are recommended to use that panel member for legal proceedings. You are free to choose your own solicitor, but please note that the policy will not respond to fees which exceed the level of fees agreed with the panel.

## IMPORTANT INFORMATION

### Fair Processing (How we use your information)

To find out how your data will be used, you can find a copy of our full 'Fair Processing Notice' at [www.homeandlegacy.co.uk](http://www.homeandlegacy.co.uk).

### Declaration

I declare that I was 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 or the Managing Agent appointed by me 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 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.

**If there is anything that you do not understand please contact Home & Legacy.**

Signature: \_\_\_\_\_

Name: \_\_\_\_\_

Date: \_\_\_\_\_

**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, Milton Keynes, Buckinghamshire, MK9 2LA or by email to [claimsteam@homeandlegacy.co.uk](mailto: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.

- Copy of the Tenancy Application
- Copy of the references obtained for the tenant(s) and their guarantor(s) (if any) and any supporting documentation such as proof of residency you obtained for the tenant(s) and guarantor(s) (if any) before the start of the Tenancy Agreement
- 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
- Copy of the Tenancy Agreement
- Copy of any Guarantors covenants
- If the property is 'fully managed', copy of current Management Authority Agreement
- Copy of any formal Notices served in connection with gaining possession of the property
- Initial Property Inventory and Condition Report
- Final Inspection Report
- Any recent Routine Inspection Reports
- A copy of the Rent Schedule detailing the rent due and the dates that any rental payments were received
- 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.

## WWW.HOMEANDLEGACY.CO.UK

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