

## **Appendix B – Facts to Keep Handy About Your Own Policy**

For use after you buy an insurance policy. Complete this form and put it with your important papers. You may want to make a copy for a friend or a relative.

### **1. Insurance Policy Date**

Policy Number \_\_\_\_\_

Date Purchased \_\_\_\_\_

Premium \_\_\_\_\_

### **2. Insurance Company Information**

Name of Company \_\_\_\_\_

Address \_\_\_\_\_

Phone Number \_\_\_\_\_

### **3. Information about Insurance Producer**

Producer's  
Name \_\_\_\_\_

Phone Number \_\_\_\_\_

Address \_\_\_\_\_

### **4. Type of Insurance Policy**

\_\_\_\_\_

**5. How much is the deductible before benefits begin?** \_\_\_\_\_

**6. How do I file a claim?** (Check all that apply)

Contact my licensed producer

Contact the company

**7. How often do I pay premiums?** \_\_\_ Annually \_\_\_ Semi-annually \_\_\_ Other

**8. Are my premiums deducted from my bank account?** \_\_\_ Yes \_\_\_ No

Name and address of my bank: \_\_\_\_\_

Bank account number: \_\_\_\_\_

**9. Where do I keep this policy?** \_\_\_\_\_

Other information \_\_\_\_\_

**10. Friend or relative who knows where my policy is:** \_\_\_\_\_

Address \_\_\_\_\_

Phone number \_\_\_\_\_