




## Insurance application checklist – what to bring to your first appointment

The following checklist will help you understand the types of documents and details required when filling in your Macquarie insurance application with your adviser. Having this information on hand will reduce the time it takes to fill in your application.

Insurance history	
Details of current insurance held with other companies including sums insured and policy numbers. Please include existing Macquarie Insurance policies.	<input type="checkbox"/>
Details of any insurance declines, exclusions, loadings or any modifications to existing insurance cover.	<input type="checkbox"/>
Details of any previous claims or benefits you may have received. These include any Centrelink or Veterans' affairs benefits.	<input type="checkbox"/>
Occupation and financial details	
Income details for the past three years (before tax income), including your tax returns.	<input type="checkbox"/>
If self-employed, a partner or working director, please have business earnings and expenses for the past three years along with ownership details and your tax returns.	<input type="checkbox"/>
Travel plans	
Details of any plans to travel outside of Australia. If so, destination of travel, duration and purpose.	<input type="checkbox"/>
Medical details	
Your current height and weight.	<input type="checkbox"/>
Details of any immediate family member's medical conditions such as cancer, diabetes and heart problems (natural parents, brothers and sisters).	<input type="checkbox"/>
Information regarding any medical conditions and subsequent treatments. Together with this, details of the treating Doctor and any medications you may have been prescribed.	<input type="checkbox"/>
Details of any other medications or treatments you are currently taking.	<input type="checkbox"/>
Doctors details	
Current address and contact phone numbers.	<input type="checkbox"/>
Date, reason and outcome of last consultation.	<input type="checkbox"/>

### How to contact Macquarie Life

-  Your adviser is your main point of contact for your insurance cover with Macquarie Life, so if you have any questions about your cover, please talk to your financial adviser.
-  You can contact Macquarie Life by mail at: GPO Box 5216 Brisbane QLD 4001
-  [www.macquarielife.com.au](http://www.macquarielife.com.au)

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