

JIM'S BOOKKEEPING INSURANCE APPLICATION FORM

Name of Applicant(s)					
Trade Name					
Business Address			State	Post Code	
Postal Address			State	Post Code	
Business Phone	()	Mobile	Fax		()
E-mail Address					
Occupation		ABN	/	/	Taxable GST %
Who is your Franchisor?		Franchise ID Number	Number of People Involved in Your Franchise		

INSURANCE PERIOD: ___/___/_____ to 30/04/2011 at 4.00pm

STEP ONE: Section A

INSURANCE PRODUCT	Base Option SUM INSURED	Gold Option SUM INSURED
LIABILITY INSURANCE (provides coverage for up to 2 people / please complete Section B if you require coverage for additional employees) <ul style="list-style-type: none"> • Public & Products Liability Limit • Excess 	\$10,000,000 \$ 250	\$10,000,000 \$ 250
PROFESSIONAL INDEMNITY INSURANCE (up to \$150,000 Fee Income) *** PI Application Form must also be completed prior to acceptance *** <ul style="list-style-type: none"> • Sum Insured any one claim (Double in the aggregate) • Fidelity Extension • Investigations & enquiries • Excess 	\$ 500,000 \$ 50,000 \$ 100,000 \$ 500	\$1,000,000 \$ 250,000 \$ 250,000 \$ 1000
GENERAL PROPERTY (eg. Computers & Equipment) <ul style="list-style-type: none"> • Sum Insured (\$2,000 limit per item, unless specified) • Excess (Please refer to the General Property section of this declaration form)	Nil	\$5,000 \$150
PERSONAL ACCIDENT ONLY INSURANCE – (includes coverage for one person / does not include illness) <ul style="list-style-type: none"> • Weekly Benefit • Capital Benefits (Death & Permanent Total Disability) • Scope of Cover • Benefit Period • Waiting Period / Excess • All Pre-Existing Medical Conditions and Past Injuries Excluded 	Nil	up to \$500 \$100,000 24 Hours 104 Weeks 7 Days
<p style="text-align: center;"><u>Standard Annual Premium (Section A)</u></p> The Standard Package includes what you see above. Any additional covers are to be completed on page 2 under Additional Cover (Section B).	\$ 795.00 <input type="checkbox"/> Yes, I want this package	\$ 1,320.00 <input type="checkbox"/> Yes, I want this package

PLEASE PROCEED TO STEP TWO ON THE FOLLOWING PAGE

STEP TWO: Section B

ADDITIONAL COVER OPTIONS SELECTION TABLE

<p>LIABILITY INSURANCE</p> <p>Upgrade your Limit of Liability from \$10,000,000 to \$20,000,000.</p> <p><input type="checkbox"/> Yes, upgrade my cover Extra Annual Premium: \$80.00</p> <p>ADDITIONAL EMPLOYEES</p> <p>Include Coverage for additional Employees under this section. Number of Additional Employees (in addition to the two automatically Insured under Section A) :</p> <p><input type="checkbox"/> Yes, please include coverage for _____ employees under my Liability Coverage. Extra Annual Premium: \$75.00 Per employee</p>	<p>COMMERCIAL MOTOR VEHICLE</p> <p>Include comprehensive coverage for your Business Use Motor Vehicle. If you select this option, please complete the Commercial Motor Vehicle Application Form. This provides coverage for vehicles up to \$50,000. Drivers must have a Rating 1 No Claim Bonus. Subject to satisfactory driving history.</p> <p><input type="checkbox"/> Yes, add to my cover All States Excluding VIC Metro & NSW Metro areas: refer to office for quote</p>
<p>GENERAL PROPERTY INSURANCE</p> <p>Upgrade your Sum Insured from \$5,000 to:</p> <p>\$10,000 <input type="checkbox"/> Yes, upgrade my cover Extra Annual Premium: \$55.00</p> <p>\$15,000 <input type="checkbox"/> Yes, upgrade my cover Extra Annual Premium: \$125.00</p> <p>\$20,000 <input type="checkbox"/> Yes, upgrade my cover Extra Annual Premium: \$195.00</p> <p>\$25,000 <input type="checkbox"/> Yes, upgrade my cover Extra Annual Premium: \$265.00</p> <p>\$30,000 <input type="checkbox"/> Yes, upgrade my cover Extra Annual Premium: \$335.00</p>	<p>ADDITIONAL PERSONAL ACCIDENT ONLY INSURANCE</p> <p>Include Coverage for a Second Person under the Personal Accident Only Section of Coverage for \$500 nett per week:</p> <p><input type="checkbox"/> Yes, include cover for an additional person under my Personal Accident Only Coverage Extra Annual Premium: \$280.00</p> <p>Please complete the Personal Accident Details for Applicant 2 on the document called "About Me And My Franchise"</p>
<p>PERSONAL ACCIDENT ONLY INSURANCE</p> <p>Please complete the following if you wish to increase your Weekly Benefit from \$500 to:</p> <p><u>Applicant 1</u></p> <p>\$600 <input type="checkbox"/> Yes, upgrade my cover Extra Annual Premium: \$75.00</p> <p>\$700 <input type="checkbox"/> Yes, upgrade my cover Extra Annual Premium: \$110.00</p> <p>\$800 <input type="checkbox"/> Yes, upgrade my cover Extra Annual Premium: \$150.00</p> <p>\$900 <input type="checkbox"/> Yes, upgrade my cover Extra Annual Premium: \$195.00</p> <p>\$1,000 <input type="checkbox"/> Yes, upgrade my cover Extra Annual Premium: \$285.00</p> <p><u>Applicant 2 (if applicable)</u></p> <p>\$600 <input type="checkbox"/> Yes, upgrade my cover Extra Annual Premium: \$75.00</p> <p>\$700 <input type="checkbox"/> Yes, upgrade my cover Extra Annual Premium: \$110.00</p> <p>\$800 <input type="checkbox"/> Yes, upgrade my cover Extra Annual Premium: \$150.00</p> <p>\$900 <input type="checkbox"/> Yes, upgrade my cover Extra Annual Premium: \$195.00</p> <p>\$1,000 <input type="checkbox"/> Yes, upgrade my cover Extra Annual Premium: \$285.00</p> <p>All pre-existing medical conditions and past injuries are excluded under this Policy.</p>	<p>PERSONAL ACCIDENT & ILLNESS INSURANCE</p> <p>Please complete the following if you wish to include Illness Coverage:</p> <p><u>Applicant 1</u></p> <p>\$500 <input type="checkbox"/> Yes, upgrade my cover Extra Annual Premium: \$285.00</p> <p>\$600 <input type="checkbox"/> Yes, upgrade my cover Extra Annual Premium: \$380.00</p> <p>\$700 <input type="checkbox"/> Yes, upgrade my cover Extra Annual Premium: \$460.00</p> <p>\$800 <input type="checkbox"/> Yes, upgrade my cover Extra Annual Premium: \$545.00</p> <p>\$900 <input type="checkbox"/> Yes, upgrade my cover Extra Annual Premium: \$625.00</p> <p>\$1,000 <input type="checkbox"/> Yes, upgrade my cover Extra Annual Premium: \$710.00</p> <p><u>Applicant 2 (if applicable)</u></p> <p>\$500 <input type="checkbox"/> Yes, upgrade my cover Extra Annual Premium: \$285.00</p> <p>\$600 <input type="checkbox"/> Yes, upgrade my cover Extra Annual Premium: \$380.00</p> <p>\$700 <input type="checkbox"/> Yes, upgrade my cover Extra Annual Premium: \$460.00</p> <p>\$800 <input type="checkbox"/> Yes, upgrade my cover Extra Annual Premium: \$545.00</p> <p>\$900 <input type="checkbox"/> Yes, upgrade my cover Extra Annual Premium: \$625.00</p> <p>\$1,000 <input type="checkbox"/> Yes, upgrade my cover Extra Annual Premium: \$710.00</p> <p>All pre-existing medical conditions and past injuries are excluded under this Policy.</p>
<p align="center">NEED LARGER SUMS INSURED OR ADDITIONAL INSURANCE PRODUCTS? CONTACT BARKER MEIER INSURANCE BROKERS PTY LTD ON 1800 662 288 FOR ASSISTANCE.</p>	

STEP THREE

<p align="center"><u>Additional Covers Premium (Section B)</u></p> <p>Please total all above Additional Covers required and insert to calculate your Total Annual Premium. If no additional covers are required please write 0.00 in the space provided.</p>	<p align="center">\$ _____</p>
<p align="center"><u>Total Annual Premium (Section A + Section B)</u></p> <p>Total Annual Premium is calculated by adding the Standard Annual Premium (Section A) to the Additional Covers Premium (Section B) as selected by You. Should you have any queries or concerns please contact our office on 1800 662 288.</p>	<p align="center">\$ _____</p>

ABOUT ME AND MY FRANCHISE

Please complete this section in order for us to update your Insurance Information. This document will be retained as an Application Form for future reference.

GENERAL PROPERTY ITEMS

If your selected insurance requirements include cover for General Property (eg. Tools and Equipment), an individual item limit of \$2,000 exists unless specified below. To ensure any individual item worth more than \$2,000 is covered under your proposed policy, please complete the following information. Each item listed below will be included within your selected sum insured (ie. if you are taking the Standard Package under Section A, your selected Sum Insured is \$8,000).

Type of Item	Make	Model No.	Serial No.	Item Dollar Value
<i>Example: Laptop</i>	<i>HP</i>	<i>6710b</i>	<i>4698 7580 632PA</i>	<i>\$2,000.00</i>
Item 1	_____	_____	_____	\$ _____ . _____
Item 2	_____	_____	_____	\$ _____ . _____
Item 3	_____	_____	_____	\$ _____ . _____
Item 4	_____	_____	_____	\$ _____ . _____
Item 5	_____	_____	_____	\$ _____ . _____
Item 6	_____	_____	_____	\$ _____ . _____
Item 7	_____	_____	_____	\$ _____ . _____
Item 8	_____	_____	_____	\$ _____ . _____

PERSONAL ACCIDENT &/OR ILLNESS INSURANCE*

If your selected insurance requirements include Personal Accident or Personal Accident & Illness cover, please complete the following information:

Applicant 1:

Name: _____

Date of Birth: ____/____/____

Height: _____ cm's

Weight: _____ kg's

Please specify all pre-existing illnesses or injuries below*:

Applicant 2:

Name: _____

Date of Birth: ____/____/____

Height: _____ cm's

Weight: _____ kg's

Please specify all pre-existing illnesses or injuries below*:

*It is important to note that all pre-existing conditions will be excluded under the proposed policy.

DUTY OF DISCLOSURE QUESTIONNAIRE

Please answer the following Duty of Disclosure questions. If you do not understand a question or require assistance, please phone 1800 066 900. If you answer yes, please provide full details (if additional space is required for your answers, please attach a separate piece of paper).

- 1) In the last 5 years, have you been convicted of any criminal offence, made any insurance claims, suffered and losses which would have been covered under the proposed insurance policy(s), had any insurance declined or cancelled, application rejected, renewal refused, claim rejected, special conditions imposed or excesses imposed by an insurer? YES NO

- 2) In the last 5 years, have you had a driver's licence cancelled, suspended or reduced to a lesser grade or had special conditions imposed or any driving offence, infringement, conviction or have any of these pending? YES NO

- 3) Are you currently or have you previously been declared bankrupt or been involved in a company or business which became insolvent or subject to any form of insolvency administration? YES NO

APPLICANT'S DECLARATION & SIGNATURE

I/We have read and understood the Barker Meier Insurance Brokers Financial Services Guide (FSG) along with the Insurers Policy Wording and Product Disclosure Statement (PDS).

I/We understand that no insurance is in force until such time as the Insurer has confirmed acceptance of the proposed insurance in writing.

I/We hereby appoint Barker Meier Insurance Brokers Pty Ltd to act as my/our Insurance Broker and Consultant.

By signing this application form, I/We consent to the uses of my/our personal information as disclosed by the Insurers in the Product Disclosure Statement and Barker Meier's Financial Services Guide (FSG).

I/We authorise Barker Meier and the Insurer's to obtain or supply details of insurance claims and other relevant information. I/We authorise Barker Meier and the Insurer's to collect or disclose any personal information relating to this insurance to/from any other insurers or insurance reference service.

I/We authorise the insurance companies named within this proposal form to give to, obtain from, other insurers or credit reference bureau's any information relating to this insurance now or in the past including claims under those insurances.

I/We declare that:

- (a) The information in this application is true and correct and I/We have not withheld any relevant information.
(b) I/We agree to accept the insurance subject to the terms, conditions, exclusions and limitations of the policies.

Applicant 1:

Name: _____

Signature: _____

Date: ____/____/____

Applicant 2:

Name: _____

Signature _____

Date: ____/____/____

**NEED ADVICE OR HAVE A QUESTION?
CALL US TODAY ON**

1800 662 288



INSURANCE PAYMENT OPTIONS

- Please find enclosed my cheque / money order for the total amount owing (as shown above).
- I want to pay my premium over monthly installments. Please complete the Barclay Express Finance Pty Ltd Direct Debit Request Form attached.
- Please charge the following Credit Card for the total amount owing (*including 1% Credit Card Fee*).

Type of Credit Card: **Bank Card** **Master Card** **Visa Card**

Card Number:

Card Expiry Date: /

Card Holder's Name: _____

Telephone Number: _____

Cardholder's Signature: _____

- I have paid the total amount owing (as shown above) directly into Barker Meier Insurance Brokers Pty Ltd's bank account and listed the reference as the nominated Franchisee's surname.

BSB: 185 300
Account Number: 2064 10151
Account Name: Barker Meier Insurance Brokers Pty Ltd

Reference No: _____ (Please provide the surname of the franchisee you are paying the account for or provide their Franchise ID Number)

What date did you transfer your payment into our account? _____ / _____ / _____