



# Your Property Insurance Checklist

for preparing Insurance (General, non-life) data entry

- To simplify data entry, see the Handy Notes below before you start.
- This will make entering information easy, simple and quick.

**Tip: destroy this sheet once used as a data entry aid.**

**For general (non-life) property of Person 1**  
(list for Person 2 on next page)

First name: \_\_\_\_\_ Family name: \_\_\_\_\_

### Handy notes:

- This checklist is for up to 10 'general' general insurance policies for Person 1 (Person 2 is on next page)
- When entering your Insurance (General) data ,select the *Protection type* from the list below.
- To assist, we have pre-inserted light coloured text for you to overwrite for *Category* and *Frequency*.
- Always use round figures for amounts (throughout your software).

### Protection types (General, 'non-life', insurance)

- Building & Contents.
- Special items (jewellery, etc).
- Vehicle.
- Tools, equipment.
- Sporting goods.

### Data entry tab > Insurance (General)

Item	Category <u>Personal / Business</u>	Protection type	Insurer (Initials)	Policy No	Premium \$ only	Frequency <u>M-Q-H-Y</u>	Insured Amount \$	Owned by
1	Personal / Business					M-Q-H-Y		
2	Personal / Business					M-Q-H-Y		
3	Personal / Business					M-Q-H-Y		
4	Personal / Business					M-Q-H-Y		
5	Personal / Business					M-Q-H-Y		
6	Personal / Business					M-Q-H-Y		
7	Personal / Business					M-Q-H-Y		
8	Personal / Business					M-Q-H-Y		
9	Personal / Business					M-Q-H-Y		
10	Personal / Business					M-Q-H-Y		

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**For general (non-life) property of Person 2**  
(list for Joint persons, see on next page)

First name: \_\_\_\_\_ Family name: \_\_\_\_\_

**Handy notes:**

- A. This checklist is for up to 10 'general' general insurance policies for Person 1 (Person 2 is on next page)
- B. When entering your Insurance (General) data ,select the *Protection type* from the list below.
- C. To assist, we have pre-inserted light coloured text for you to overwrite for *Category* and *Frequency*.
- D. Always use round figures for amounts (throughout your software).

**Protection types (General, 'non-life', insurance)**

- Building & Contents.
- Special items (jewellery, etc).
- Vehicle.
- Tools, equipment.
- Sporting goods.

**Data entry tab > Insurance (General)**

Item	Category <u>Personal / Business</u>	Protection type	Insurer (Initials)	Policy No	Premium \$ only	Frequency <u>M-Q-H-Y</u>	Insured Amount \$	Owned by
1	Personal / Business					M-Q-H-Y		
2	Personal / Business					M-Q-H-Y		
3	Personal / Business					M-Q-H-Y		
4	Personal / Business					M-Q-H-Y		
5	Personal / Business					M-Q-H-Y		
6	Personal / Business					M-Q-H-Y		
7	Personal / Business					M-Q-H-Y		
8	Personal / Business					M-Q-H-Y		
9	Personal / Business					M-Q-H-Y		
10	Personal / Business					M-Q-H-Y		

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### Joint Persons

(list for Persons 1 & 2 on previous pages)

First name: \_\_\_\_\_ Family name: \_\_\_\_\_

First name: \_\_\_\_\_ Family name: \_\_\_\_\_

### Handy notes:

- This checklist is for up to 10 'general' general insurance policies for Joint persons.
- When entering Insurance (General) data ,select the *Protection type* from the list below.
- To assist, we have pre-inserted light coloured text for you to overwrite for *Category* and *Frequency*.
- Always use round figures for amounts (throughout your software).

### Protection types (General, 'non-life', insurance)

- Building & Contents.
- Special items (jewellery, etc).
- Vehicle.
- Tools, equipment.
- Sporting goods.

### Data entry tab > Insurance (General)

Item	Category <u>Personal / Business</u>	Protection type	Insurer (Initials)	Policy No	Premium \$ only	Frequency <u>M-Q-H-Y</u>	Insured Amount \$	Owned by
1	Personal / Business					M-Q-H-Y		
2	Personal / Business					M-Q-H-Y		
3	Personal / Business					M-Q-H-Y		
4	Personal / Business					M-Q-H-Y		
5	Personal / Business					M-Q-H-Y		
6	Personal / Business					M-Q-H-Y		
7	Personal / Business					M-Q-H-Y		
8	Personal / Business					M-Q-H-Y		
9	Personal / Business					M-Q-H-Y		
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