

**Financial Line Claim Guidelines**  
**- Preliminary Information & Documents Required on**  
**Notification of Claim and Notification of Circumstances**

**金融责任险索赔操作程序 - 接到索赔通知或可能索赔的通知时需要提供的初步信息和资料**

**This document sets out the preliminary list of information which we require to consider your notification of claim or potential claim.**

这份文件列出了我们就贵公司提出索赔通知或可能索赔的通知时需要提供的初步信息清单。

**The acceptance of required information or documents is not in itself an admission of liability on the part of the Company.**

本公司接受所要求的信息和资料并不代表已承认赔偿责任。

**Each claim or potential claim is unique. You will understand that we have to reserve our rights, to request from time to time, for such further information and documents as we may deem necessary to enable us to properly consider any matter reported to us.**

每个索赔或可能的索赔都是独一无二的。请您理解我们不得不保留向你们时刻索取相关信息和文件的权利，因为我们认为这些信息和文件可能对我们能充分地了解报给我公司的事件是必要的。

**This document does not in any way vary any of the terms and conditions of the relevant policy. In the event of inconsistency between this document and the relevant policy, the terms and conditions of the relevant policy shall prevail.**

这份文件将不改变任何相关保单中的条款和条件。如果这份文件和相应的保单之间出现矛盾或不同，那将以相关保单的条款和条件为准。

**Pending our review and comments on policy coverage, we continue to reserve all our rights under the relevant policy and at law.**

在保单责任的审核和评论决定之前，我公司将继续保留我们相关保单和法律下的一切权利。

**PRELIMINARY INFORMATION REQUIRED ON NOTIFICATION OF CLAIM**

**当提出索赔通知时需要提供的初步信息**

Where a claim has been made, the following information and documents are required.

当索赔已经提出时，以下信息和文件是需要的。

## Section A. Information Required

### 第一部分 所需信息

1. Date of claim, or, where a writ has been served:-

索赔提出的日期, 或者接到书面文件的地点

(a) Date of filling of writ;

书面文件备案的日期

(b) Date of service of writ;

接到书面文件的日期

(c) (i) Whether any claim or demand was made prior to the writ; and

在接到书面文件之前, 是否收到过任何索赔或主张,

(ii) If so, the date(s) of the prior claim or demand.

如果是, 请告知收到索赔和主张的日期

2. Date when the alleged event or incident occurred

声称的事件或事故发生的日期

3. Date of discovery

发现的日期

4. Identity of party making the claim

提出索赔方的身份

5. Identity of claimant's lawyers, if any

提供索赔方的律师的身份, 如果有

6. Identity of Insured Person against whom claim is made: -

索赔所针对的被保险人的身份

(a) Name of Insured Person

被保险人的名称

(b) Position held when the alleged event or incident occurred.

在事件或事故发生时被保险人所处的职位

7. Identity of Law Firm and Defence Counsel on record appointed by Insured Person, if any

被保险人委派的律师行和辩护律师的身份, 如果有

8. Details as to the hourly rates of Defence Counsel.

该辩护律师的收费标准

9. Relationship of claimant to the Insured Organisation and / or Insured Person

索赔方与被保险人所处公司或被保险人个人之间的关系

10. Description of the claim including a description of the allegations made by claimant

索赔的具体描述, 包括索赔方提出主张的描述

11. Potential damage:-

可能的损失

(a) Actual amount claimed; or

实际索赔的金额, 或者

Chubb. Insured.<sup>SM</sup>

(b) If not quantified, estimated quantum of loss, if any

如果还没有确定, 提供损失的预估金额

12. Any other relevant information.

其他相关信息

## Section B. Documents Required

### 第二部分 所需文件

1. Copy of letter of claim and/or letter of demand (e.g., letter from claimant making the allegations and/or claim), if any

提供索赔函或者主张信的复印件(例如索赔方制作的主张或这索赔的信函), 如果有

2. Copy of all court documents to date (if any), including:-

迄今为止, 所有法庭文件的复印件(如果有), 包括

(a) Writ of Summons 传票

(b) Statement of Claim 诉之申明

(c) Counter-claim 反诉

(d) Defences 辩词

(e) Replies 答辩词

(f) Affidavits (including all attachments thereto). 宣誓书(包括所有与之相关的附件)

3. Copy of all relevant contract(s) and/or agreement(s) between the parties, if any

所有各方之间的相关合同和/或协议, 如果有

4. Copy of all relevant correspondence between the parties, if any (e.g., emails, internal memo(s), letter(s), minute(s) or record(s) of meeting(s))

相关各方之间的往来通信的复印件(比如电子邮件, 内部备忘录, 信件, 会议摘要或者纪录等), 如果有

5. Copy of internal investigation report (including all attachments thereto), if any

内部调查报告的复印件(包括所有与之相关的附件), 如果有

6. Copy of all domestic enquiry reports (including all attachments thereto), if any

所有内部的咨询报告(包括所有与之相关的附件), 如果有

7. Copy of curriculum vitae of Defence Counsel appointed by Insured Organisation and / or Insured Person

被保险人所处公司和/或被保险人的辩护律师的履历

8. Copy of legal opinion, if any, rendered by Defence Counsel in respect of the matter

辩护律师就该事件提出的法律意见复印件, 如果有

9. Any other relevant document, if any (for example, police reports)

其它任何相关文件(例如警局的报告), 如果有



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Should you have any question, please contact any one of our claims personnel:

如果您在提出索赔时需要额外的协助, 或想了解更多关于索赔的信息, 请联系

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## CHUBB CLAIMS REPRESENTATIVES

安达保险有限公司理赔部

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