



# Travel Insurance Fact Finder

## PLEASE COMPLETE ALL SECTIONS

Date: \_\_\_\_\_ Service Inspector: \_\_\_\_\_ Date Quote Required For: \_\_\_\_\_

Quote Details to Be Sent to Service Inspector / Client \_\_\_\_\_

Name of Policyholder: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Postcode: \_\_\_\_\_

## TRAVEL DETAILS

Single Trip/Annual: \_\_\_\_\_

EU / Worldwide / Worldwide excluding Canada and USA (only applies Single Trip) \_\_\_\_\_

Dates of Cover Required: **from** \_\_\_\_\_ **to** \_\_\_\_\_

## PERSONS TO BE INSURED

Name: \_\_\_\_\_ Age: \_\_\_\_\_ Medical Conditions: \_\_\_\_\_

Proposer: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## METHOD OF PAYMENT

Cash / Cheque: \_\_\_\_\_

OTHER INFORMATION OR COVER REQUIREMENTS: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



## Data Protection and Client Consent

The information you have provided is subject to the Data Protection Act 1998 (the "Act"). By signing this document you consent to us or any company associated with us processing, both manually and by electronic means, your personal data for the purposes of providing advice, administration and management.

"Processing" includes obtaining, recording or holding information or data, transferring it to other companies associated with us, product providers, the FSA or any other statutory, governmental or regulatory body for legitimate purposes including, where relevant, to solicitors and/or other debt collection agencies for debt collection purposes and carrying out operations on the information or data.

We may also contact you or pass your details to other companies associated with us to contact you (including by telephone) with details of any other similar products, promotions, or for related marketing purposes in which we think you may be interested.

The information provided may also contain sensitive personal data for the purposes of the Act, being information as to your physical or mental health or condition; the commission or alleged commission of any offence by you; any proceedings for an offence committed or alleged to have been committed by you, including the outcome or sentence in such proceedings; your political opinions, religious or similar beliefs, sexual life; or your membership of a Trade Union.

Please tick this box to confirm your consent to us or any company associated with us processing any such sensitive personal data.

If you are happy for us or any company associated with us to contact you for marketing purposes by e-mail, telephone, post or SMS, please tick this box.

If at any time you wish us or any company associated with us to cease processing your personal data or sensitive personal data, or contacting you for marketing purposes, please contact:

The Data Protection Officer on **0114 261 2020** or in writing at **Joseph W Burley & Partners (UK) Ltd, 5-8 Jessops Riverside, Brightside Lane, Sheffield, S9 2RX.**

You may be assured that we and any company associated with us will treat all personal data and sensitive personal data as confidential and will not process it other than for a legitimate purposes. Steps will be taken to ensure that the information is accurate, kept up to date and not kept for longer than is necessary. Measures will also be taken to safeguard against unauthorised or unlawful processing and accidental loss or destruction or damage to the data.

Subject to certain exceptions, you are entitled to have access to your personal and sensitive personal data held by us. You may be charged a fee (subject to the statutory maximum) for supplying you with such data.

Signature \_\_\_\_\_ Date \_\_\_\_\_