

# THE GREEN BOOK CHECKLIST –

## Finding the right insurance broker





## Checklist: Finding the right insurance broker

<p>1. Why should I use a broker instead of buying my policies direct?</p>	<p>Notes:</p>
<p>2. How long have you been an insurance broker?</p>	<p>Notes:</p>
<p>3. How do you stay abreast of changing rules and regulations in the industry?</p>	<p>Notes:</p>
<p>4. What insurance do I actually need and how much is it worth?</p>	<p>Notes:</p>
<p>5. Will you walk me through all of the inclusions of my policy/ies?</p>	<p><input type="checkbox"/> Yes   <input type="checkbox"/> No Notes:</p>
<p>6. In the event of a claim, what is the process?</p>	<p>Notes:</p>

<p><b>7.</b> Are you authorised by Australian Prudential Regulation Authority (APRA)?</p>	<p><input type="checkbox"/> Yes   <input type="checkbox"/> No</p> <p>Notes:</p>
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<p><b>8.</b> Will you provide a Policy Disclosure Statement (PDS) and more importantly, help me to understand what it means?</p>	<p><input type="checkbox"/> Yes   <input type="checkbox"/> No</p> <p>Notes:</p>
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Additional comments