

# Heritage

Insurance Company

A member of  LIBERTY

Regulated by the Insurance Regulatory Authority



The Heritage Insurance Company Kenya Limited  
Liberty House, Processional Way  
P.O BOX 30390 - 00100, Nairobi, Kenya  
(t) 254 20 278 3000 (f) 254 20 272 7800  
(m) 0711 039 000, 0734 101 000  
(e) info@heritage.co.ke  
(w) www.heritageinsurance.co.ke

## PROPOSAL FORM FOR PRIVATE CAR INSURANCE

AGENT / BROKER

ACCOUNT NO.:

POLICY NUMBER

### SECTION 1

#### (A) - INDIVIDUAL CUSTOMER DETAILS

- i) Full Name of Proposer  
(First Name) (Second Name) (Other Names)  
Date of Birth - - - Gender  Male  Female Marital Status  Single  Married  
Nationality Citizenship
- ii) Contact Details: (mobile): (tel):  
(email address):  
(Postal Address): (Postal code): (town/city):  
Residential Address (Physical)
- iii) Identification Doc. Identification Type Identification Number Expiry Date  
 Identity Card  
 Passport  
 Asylum  
(Attach a copy of Identification Document)
- iv) Income Tax No. (PIN) (Attach a copy of PIN Certificate)
- v) Are you Employed?  Yes  No OR ii) Self Employed?  Yes  No
- vi) If employed, state your current employer
- vii) Occupation Sector
- viii) Source of Income  Salary  Business Proceeds  Pension  Rent  
 Non-Income generating dependant
- ix) Source of Wealth  Legal Settlement  Royalties  Inheritance  Donations  
 Winnings  Savings  Sale of Investment  Sale of Property  
 Rent  Employment  Pension  Business Proceed
- x) Full Name of Next of Kin Relationship  
(Telephone No.):

#### (B) - LEGAL ENTITY, CORPORATE OR SME CUSTOMER DETAILS

- i) Trade Name  
Legal/Registered Name  
Registration Number  
Country of Incorporation Country of Parent Company if any
- ii) Contact Details (mobile): (tel):  
(email address):  
(Postal Address): (Postal code): (town/city):  
Physical Location
- iii) Nature of Business Sector



- iv) Income Tax No. (PIN) \_\_\_\_\_ (Attach a copy of PIN Certificate)
- v) Beneficial Owner (Attach CR12)
- vi) Source of Income  Business Proceeds  Rent (and Estate)  Donations  Government Funding
- vii) Source of Wealth  Legal Settlement  Royalties  Interest  Savings  
 Court Order  Sale of Property  Sale of Investment  
 Government Funding  Shareholders Contribution

**SECTION 2 - PROPOSAL DETAILS**

- i) Period of insurance From \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ To \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_
- ii) Address where car is usually garaged \_\_\_\_\_
- iii) Bank/Company with interest \_\_\_\_\_

Registration Number	Make of vehicle	Model of vehicle	Cubic Capacity (CC)	Year of Manufacture	Body Type	Fuel Type Petrol, Diesel, Hybrid, Electric, others specify	Manufacturers seating capacity Incl. driver	State any changes made to maker's design of body or engine. If none state 'NONE'	Estimated Proposed Sum insured

PLEASE ATTACH A COPY OF THE LOG-BOOK FOR EACH VEHICLE

1. COVER REQUIRED

- a)  Comprehensive
- (i) Option 1 - Ordinary comprehensive cover
- (ii) Option 2 - Heritage Auto correct cover
- ( This cover is based on telematics Technology to collect and transmit data on how you drive. See the product information sheet for more details )

Optional Extensions

- (I) Political Violence & Terrorism
- (II) Excess Protector for claim values above standard excess amount

NB:

- (i) All Vehicles insured on Comprehensive basis must undergo valuation within 14 days of incepting cover. This does not apply to show room vehicles.
- (ii) Political Violence and Terrorism and Excess Protector will attract additional Premium.
- (iii) Excess Protector does not apply to Total Loss Theft Claims.

- b)  Third Party Fire & Theft
- c)  Third Party Only

Windscreen :	Free limit for each option is Kshs 30, 000/=, Indicate additional limits require
R/C/ CD :	
Towing :	
Medical :	

Are you entitled to No Claim Discount from your previous Insurers? Yes No  
 If so attach a No Claim Discount Certificate

2. Name of Previous Insurer : \_\_\_\_\_  
 Policy Number : \_\_\_\_\_
3. Will the car be used for social, domestic and pleasure purpose and by the Insured in connection with Insured's business or profession excluding Hire & Reward? Yes No
4. Do you have a current license (not Provisional) to drive Motor Cars? Yes No  
 State period(s) with dates, of your car driving experience \_\_\_\_\_
5. Do you, or does any person who will be driving the vehicle(s) to your knowledge :  
 i) Suffer from defective vision, hearing or from any physical or mental infirmity or fits of any kind? Yes No



ii) Been convicted during the past (5) years of any motoring offence? Yes No  
 If yes, give details : \_\_\_\_\_

6. Have you or any person who will be driving had a proposal declined, increased premiums or imposed on special conditions? If yes, give details : Yes No  
 \_\_\_\_\_

7. Has any vehicle owned or driven by you been involved in any accident or loss in the past 3 years? Please complete the panel provided (next page) in full. Yes No  
 IF NONE , state "NONE" here : \_\_\_\_\_

Past 3 Years	Total number of cars, vehicles or cycles owned by you each year	Total number of accidents or losses in connection with vehicles or cycle OWNED or DRIVEN by you	Damage to Proposer's cars, Vehicles or Cycles Amount	Third Party Amount	OFFICE USE ONLY

8. Give details of the car Anti-Theft device fitted : \_\_\_\_\_

9. Kindly select your preferred mode of delivery of your policy document and other official documents  
 Email     Postal Address     Collection from our issuing Branch Office

**HERITAGE AUTO CORRECT COVER DECLARATION**

[ Only for comprehensively insured vehicle - Option (ii) ]

I \_\_\_\_\_ declare that I have read and understood the Heritage Auto Correct Motor Insurance policy which is based on Telematics Technology operations. I hereby consent to The Heritage Insurance Company Kenya Limited to install the Telematics device in my vehicle and to effect insurance on that basis.

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

**CONSENT & DECLARATION**

I/We consent to The Heritage Insurance Company Kenya Ltd ;

- (i) Collecting, using, disclosing and/or processing my/our personal data; and
- (ii) Transferring my/our personal data to their reinsurers and affiliated companies for the purposes of insurance as permitted by law.

I/We hereby declare the truth and correctness of the above statements and particulars and agree that this Proposal and Declaration shall be held to be promissory and the basis of the contract between me/us and The Heritage Insurance Company Limited. I/We undertake that the vehicle(s) to be insured shall not be driven by any person who to my/our knowledge has been refused any Motor Vehicle Insurance or continuance thereof.

Proposer's Signature : \_\_\_\_\_ Date: \_\_\_\_\_

*No liability (except for the period stated in the Insurer's Official Cover Note) is undertaken until the Proposal is accepted by the Insurer and the premium paid.*