

# Claims Service

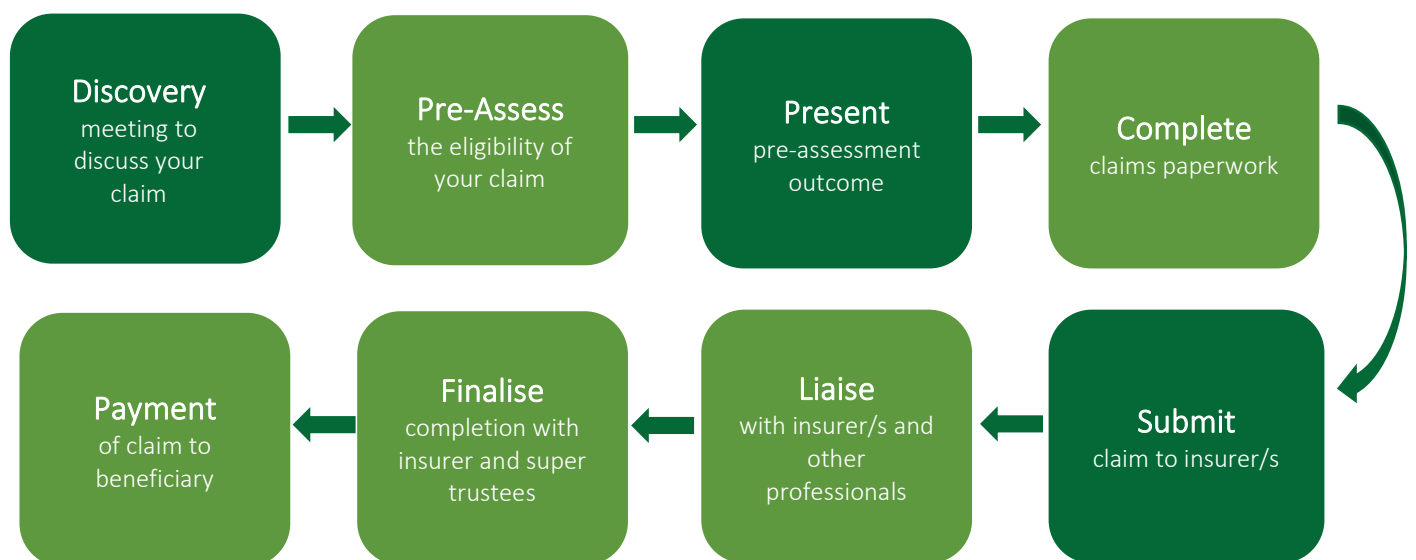


## A helping hand when you need it most...

At Succession Matters, our Claims Service is all about understanding your claim and assisting you to get the best possible outcome.

We will guide you through the entire process from initial appointment, information gathering, completing paperwork, liaising with insurers to finalising your claim.

## Our Claims Process



## Claims Service – Fees

Our Claims Service include:

- Discovery meeting – No obligation
- Pre-assess eligibility of Claim - \$550
- Facilitate claim to settlement – see table below

Type of Claim	Details	Fees
Income Protection	Initial claim	\$2,410 - \$3,615
	Ongoing claim - monthly fee applicable	\$437 - \$612 per month
Trauma	Claim facilitation to settlement +	Initial fee \$1,650 * Plus 2% upon settlement **
Total & Permanent Disablement	Claim facilitation to settlement +	Initial fee \$1,650 * Plus 3% upon settlement **
Death	Claim facilitation to settlement +	Initial fee \$1,650 * Plus 2% upon settlement **
Additional Policy	If you have more than one policy to be claimed	As above, less 10% discount

- All fees are inclusive of GST.
- The Pre-assess eligibility of claim fee of \$550 is non-refundable and payable in advance.
- \* Initial Facilitation Fee required prior to lodgement of claim.
- \*\* Balance of fees are success based and payable upon settlement of claim proceeds.
- + On average, we allow **3** months to facilitate your Death, Trauma and initial Income Protection claims and **9-12** months for TPD claims.
- Where your claim is more complex the fee may differ from those listed above and will be confirmed post pre-assessment of eligibility.
- Existing Succession Matters clients will receive an automatic 25% discount applied to their claim facilitation fee.