

# Quotation checklist

## 報價資料清單



### General information for insurance quotation

#### 報價所需的一般資料

- Policyholder 投保人
- Business nature 業務性質
- Period of insurance 保障期
- Claim record for past three years 過去三年索償記錄

### Property insurance

#### 財產保險

- Sum insured 投保額
- Insured items (e.g. building, content, nature of stock, etc.) 投保類別（例如：樓宇結構、財物、存貨等）
- Risk location information (e.g. address, building age, fire protection (if any) and security measures (if any))  
投保地址資料（例如：地址、樓齡、消防設備（如有）及防盜設備（如有））

### Home insurance

#### 家居保險

- Risk location 投保地址
- Household gross floor area/saleable area 建築面積／實用面積
- Property type (Multi-storey building/village house/detached house) 樓宇類型（多層大廈／村屋／獨立屋）
- Building age 樓齡
- Extra facilities (if any) (garden/roof/carpark/private swimming pool of the home) 額外設施（如有）（居所的花園／天台／停車場／私人泳池）

### Motor insurance

#### 汽車保險

##### I. Vehicle information

- Sum insured (Applicable to comprehensive insurance)  
投保額（適用於綜合保險）
- Make & model 廠名及型號
- Manufacturing year 製造年份
- c.c. (Private Car)/Tonnes (Goods Carrying Vehicle)  
汽缸容量（私家車）／噸數（貨車）
- No claim discount 無索償折扣
- Body type 車身類型

##### II. Driver information

- Occupation of driver or business nature  
駕駛者職業或業務性質
- Age of driver 駕駛者年齡
- Driving experience of driver 駕駛經驗
- Past two years driving offence points record (if any)  
過去兩年之扣分紀錄（如有）

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### Employee's compensation insurance

#### 僱員補償保險

- Occupation of employee 僱員職業
- Annual payroll of employee 僱員薪金
- Number of employee 僱員人數

### Public liability insurance

#### 責任保險

- Risk location 投保地址
- Limit of liability 責任限額
- Number of employees in the risk location 於投保地址內之僱員人數

### Short-term group personal accident insurance

#### 短期團體意外保險

- Details of insured event 投保活動詳情
- Location of insured event 投保活動進行地點
- Number of participants 參與人數
- Type of participants 參與人類別
- Age limit 年齡限制
- Sum insured per person on 每人之投保額
  - ✓ Accidental Death & Permanent Disablement 意外死亡及永久傷殘
  - ✓ Accidental Medical Expenses 意外醫療費用

**Remarks 備註：**

The above information is the basic requirement to get a quotation. Zurich Insurance Company Ltd may ask for additional information for underwriting purpose. 以上為報價之基本所需資料。蘇黎世保險有限公司會就個別個案要求額外資料以作核保之用。