

FIDELITY GUARANTEE INSURANCE PROPOSAL FORM



Thank you for taking time to fill this form. Fidelity Shield Insurance Company Limited is committed to processing your personal information according to the provisions of the Data Protection Act, 2019. Please take time to carefully read the Privacy Notice attached at the end of this form before filling in your details for more details about how we collect, use and safeguard your personal information.

Insured _____ Policy No _____

Address _____ Agency _____

Mortgagee or other interested parties _____ Address _____

Period insurance required for period from _____ To _____

QUESTIONS

1. (a) Do the names in the Schedule on the reverse comprise those of the whole of the staff employed by you in the above business? _____

(b) If not, state the names and/or, occupations of those excluded and the reason for such exclusion

2. Have the several persons named in the Schedule performed their respective duties to your satisfaction?

3. Have any of the persons named in the schedule ever been in your employment before, and if so, why did he or they leave? _____

4. (a) Has the fidelity of your staff or any of them been guaranteed to you before this? _____

(b) If not, why is it now required? _____

5. Are any of the persons named in the Schedule permitted to engage in any other business or employment?

6. Is there any Outstanding Account or Cash balance now due to you by any other business or employment?

7. Has there ever been any default irregularity in the Accounts of any one or more of the persons named in the schedule? _____

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8. What checks are used to secure accuracy in your accounts and at what periods do you undertake to balance and close the Cash Accounts of your business? _____
9. How often will your Account Books be Audited, and by whom will they be Audited? _____
10. How often will you're the Bank Statements and Cash Book be examined, and by whom? _____
11. What are the regulations as to payment to you of money received on your accounts by any of the persons named in the Schedule? _____
12. How often will you furnish Statements of Accounts direct to Customers and not through the individual usually responsible for that duty? _____
13. Do you write to all persons reported by the cashier as not having paid their accounts. Or how, otherwise, will you check irregularity? _____
14. (a) Are numbered Receipt Forms with Counterfoils used, and are these made out by a clerk or official other than the one who receives the cash? _____
- (b) If not, what forms are used? _____
15. If any person in your employment authorised or pay any expenses out of money collected? _____
16. Has any person holding any position in your employment committed any default? If so, state particulars

17. Is this guarantee the only security required by you? _____
18. Have you taken or do you propose to take from or on behalf of any of the persons named in the Schedule any guarantee of or security for fidelity other than the Policy now applied for? If so, state particulars

I HEREBY DECLARE – That the answers given above in every respect true; and that I have not withheld any information likely to affect the acceptance of this Proposal: and I agree that this Proposal and Declaration shall be the basis of the contract between the Company and myself: and I further agree to accept the terms exceptions contained in the Company's Fidelity Guarantee Policy or extended by any endorsement thereon or on any certificate of Insurance issued by the Company in lieu of a Policy.

I hereby declare to the best of my knowledge, that the personal information provided in this form is true, complete, and accurate. I will immediately inform the Company in writing of any changes to the information or details provided in this form

Date ____ / ____ / ____

Signature _____

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Fidelity Shield Insurance Company would, on occasion, like to keep you updated about its products and services which it considers may interest you.

Please tick any of these boxes indicating how you wish to receive our updates.

SMS Phone Call
 Email

If you wish to opt out of receiving these communications, please send us an email at info@fidelityshield.com or writing to us at P. O. BOX 47435 or call us on +254(0)709988000.

PRIVACY NOTICE

Fidelity Shield Insurance Company Limited (“THE COMPANY” “The Company” “We” “Us”) is a leading general insurance service provider offering a wide range of insurance products and services to individuals, corporates, small and medium enterprises, and the government. The company continuously reviews its operating processes, products and services to ensure that it sustainably delivers quality to exceed its customers’ expectations. This Privacy Notice provides an overview of information we collect about you, how we use and safeguard it. Please click

this link to read the Company’s Corporate Privacy Notice. <https://fidelityshield.com/>.

1. Scope of this Privacy Notice

This Privacy Notice applies to our customer (new & existing), agents/brokers or anyone who interacts with us regarding our services in any way. We refer to these individuals as (“you,” “your”) in this Notice. This Privacy Notice informs you of how we process, use and safeguard your personal information.

2. How we collect your personal data

We collect personal data directly from by email, phone call or by hardcopy forms, book entries or correspondence such as letters. We also collect your information indirectly when you purchase our products or make enquiries or complaints through our website or through CCTV installed at any of our offices. When you give us any information about other people, you must ensure that they have Notice of this Privacy Notice and are comfortable with you disclosing such information.

3. Categories of personal data we collect.

We process the following categories of personal information about you: biodata, contact information, identification information, location data, source of income, claims details, response given to questions contained in our proposal or claim forms, information contained in policy documents, premium details, online identifies such as cookies and related tags, past claims history, any questions and complaints you may have. We also process sensitive personal data such as your gender, sexual orientation, marital status, property details including financials and health data. In relation to your beneficiaries and next of kin, we may process their biodata including names, contact information and location data.

4. How we use your personal data

The information you provide us will be used to process your insurance claim, to underwrite insurance products and provide you policy covers, process premiums, generate quotes, conduct KYC background checks before issuing you policy covers, seek valuation services before issuing you policy cover, to determine whether to engage the services of loss assessors, investigators or adjusters , to evaluate the legitimacy of your claim, to facilitate payment of your claim, process your renewal policy requests, send you promotional materials, establish exercise and defend legal claims and to comply with our legal obligations.

Should you fail to provide any or all the information requested in this form, we may not be able to offer our full range of services to you or offer our services as effectively as we wish to.

5. Sharing your personal data

We share your personal data within the company on a need-to-know basis. We also share your data with other third parties who help us provide services to you (for example website service providers, loss assessors, investigators and adjusters and consultants). We may also share your information when required to by law or court order. We take all reasonable steps to secure your data whenever we share it with third parties including vetting all third parties and, where appropriate, signing processing agreements with them. You can read more about what information may be shared in what circumstance in our full Privacy Notice.

6. International data Transfers

We may transfer your personal data outside Kenya to: -

- a. Website services providers
- b. Cloud service providers

We only share your data internationally to countries with appropriate safeguards as determined by law. We also put in place additional measures like processing agreements to safeguard your data. You can read more about what information may be transferred internationally and in what circumstance in our full Privacy Notice.

7. Lawful grounds for processing your personal data.

We process your personal data on the following legal bases: -

- a. informed consent
- b. a requirement for performance of a contractual obligation
- c. compliance with our legal obligations
- d. our legitimate interests and for historical
- e. statistical, journalistic, literature and art or scientific research.

We process personal data relating to next of kin and beneficiary on the following legal bases: - to perform contractual obligations, to comply with our legal obligations, for other legitimate interests and for historical, statistical, journalistic, literature and art or scientific research purposes.

8. Data Security

We have taken appropriate technical, physical, legal, and organizational measures consistent with applicable privacy and data security laws to protect the confidentiality, integrity and availability of your personal information.

9. Data Retention

We store your personal data for as long as is necessary to fulfil the purpose for which was collected. We have policies and procedures in place that specify how long we keep your data in line with the law. We have also selected appropriate disposal methods for your personal data. You can read more about our retention and disposal procedures in our full Corporate Privacy Notice. If you no longer wish for us to hold your data, you can contact us on info@fidelityshield.com.

10. Your rights and duties

You have the right to be informed how we use your personal data. You also have the right to access your information and to ask us to correct, erase and restrict the use of your information. Additionally, you have the right to object to your information being used by us and to receive your personal data in a structured, commonly used, and machine-readable format and to transmit the data to another data controller or data processor without any hindrance. Where you have provided consent for use of your child's information, the transfer of your sensitive data internationally, the use of your personal data for commercial purposes or any other consent, you may withdraw your consent at any time. You also have the right to human intervention in any automated decision-making we may undertake using your data.

You have a duty to promptly inform us of any changes to your personal information.

11. How to Exercise Your Rights

If you wish to exercise any of your rights and freedoms rights or duties, please contact us on info@fidelityshield.com. We may contact you periodically to verify your personal information and to inform you of any changes in our Privacy Notice.

12. Our Contacts

If you have any questions, comments, complaints or suggestions about this privacy policy, or any other concerns about the way in which we process information about you, please contact us at info@fidelityshield.com address or write to us at P.O.BOX 47435.