

**MONEY INSURANCE
PROPOSAL FORM**



Thank you for taking time to fill in 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 _____

_____ Trade or Business _____

Period insurance required for period from _____ To _____

Situation of premises _____

Name and Address of your Bank _____

2 (a) State particulars of normal carry from _____ / _____ / _____ To _____ / _____ / _____

(b) Normal mode of carry _____

(c) If carried by person, is he/she accompanied? _____

3. Will there be any circumstances where the normal carry may be varied? _____

If so, give particulars _____

4. Are all monies banked daily? _____ If not, give details _____

5. At what intervals are salaries and wages paid? _____

6. Details of safes and strongrooms where money is kept:

(a) Maker's name _____

(b) Date of purchase, new or secondhand _____ / _____ / _____

(c) value _____

(d) Is safe security fixed? _____

(e) size _____

7. Are premises occupied at night? _____ If so, by whom? _____

8. Have you ever sustained a loss of the kind to be insured? _____

If so, give particulars _____

9. Have any Companies or insurers in respect of the risks to which this proposal applies: -

(a) Declined to insure you _____

(b) Required special terms to insure you _____

(c) Cancelled or refused to renew your insurance _____

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(d) Increased you premium on renewal _____

10. State estimated annual carry in respect of "Money" as defined below (excluding crossed cheques): -

(a) Drawn from Bank or Post Office Kshs. _____

(b) Paid into Bank or Post Office Kshs. _____

(c) Paid into the Post Office for purchase of Money Orders, Postal Notes or Stamps Kshs. _____

Total Estimated Annual Carry Kshs. _____

Completing Cover Note No. _____ Replacing Policy No. _____ Due ____ / ____ / ____

LIMIT OF LIABILITY IN RESPECT OF "MONEY"

LIMIT ANY ONE LOSS

- (i) Whilst in transit Kshs. _____
- (ii) Whilst at any of the Insured's sites of contracts during business hours. Kshs. _____
- (iii) Whilst in the premises during business hours Kshs. _____
- (iv) Whilst in locked safe or strongroom on the premises outside business hours Kshs. _____
- (v) Kshs. _____
- (vi) Kshs. _____

DEFINITIONS:

BUSINESS HOURS Means the Insured's Office hours and the working hours (including overtime) during which the Insured, his Principals or Employees entrusted with the Insured's Money are on the premises for the purpose of the Insured's business. **MONEY** Means Current Coin Bank and Currency Notes Cheques Postal Notes and Money Orders.

I/WE DO HEREBY DECLARE AND WARRANT that the answers given above are in every respect true and correct I/WE have not withheld any information likely to affect the acceptance of this Proposal, and I/WE agree that this Proposal and Declaration shall be the basis of the Contract between the Company and myself/ourselves and I/ WE further agree to accept the terms exceptions and conditions contained in the Company's Policy as modified or extended by any endorsements thereon.

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 _____

CALCULATION OF PREMIUM	Premium	Kshs. _____
	P.C.H. F	Kshs. _____
	T/Levy	Kshs. _____
	S/Duty	Kshs. _____

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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 write 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 customers (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 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 financial 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: -

- Website services providers
- 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: -

- o informed consent
- o a requirement for performance of a contractual obligation
- o compliance with our legal obligations
- o our legitimate interests and for historical
- o 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 will use 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 by 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 to 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 or write to us at P. O .Box 4743.