**Docuware – New Business & New Policy**

**Annexure A – Document list**

 **QUOTATION DOCUMENTS**

1. Proposal form & all supporting documents
2. Quote approval / acceptance from insurer

**FAIS DOCUMENTATION**

1. Signed: Letter of introduction
2. Signed: Brokers appointment
3. Signed: Advice record

**POLICY DOCUMENTATION**

1. Signed: Quotation
2. Signed: Banking details
3. Activated policy schedule (Flexi schedule or direct schedule)
4. Proof of receipt by Client policy schedule & policy wording
5. Proof of receipt by insurer all applicable signed documentation