



GLOBAL PACIFIC  
FINANCIAL SERVICES LTD.

## Introducing the Policy Delivery Receipt

Submitted by Tracey on September 28, 2015 - 6:10pm

A policy delivery receipt is now enclosed with every new insurance policy issued or with every change to an existing policy. It must be signed by the policyowner and the representative when the policy is delivered.

To view the Customer Service Announcement and applicable forms...[read more](#)



A **policy delivery receipt (#11155E)** is now enclosed with every new insurance policy issued or with every change to an existing policy. It must be **signed** by the **policyowner** and the **representative** when the policy is delivered.

### Why use the delivery receipt?

- It is a formal confirmation that you delivered the policy to the policyowner on the delivery date.
- It is also a written acknowledgement that you explained the main features of the policy to your client.
- It enables you to comply with regulatory and industry best practices.

### Steps:

- Two copies of the policy delivery receipt are enclosed with every policy.
- When the contract is accepted, each copy must be signed. A copy must be left with the policyowner(s) and another copy must be returned to head office.
- When a proposed insured's insurability conditions have changed (for initial application for insurance or request for change requiring evidence of insurability ONLY), you must have the **Insurability Questionnaire (#14238E)** completed for each of the insureds in question and return the policy and insurability questionnaire(s) to head office.
  - The policy delivery receipt does not need to be signed.
  - Desjardins Insurance will reassess the insurance application based on the new information provided.

- To process every file as quickly as possible, the insurability questionnaires will first be analyzed by Jet Underwriting. When a more thorough analysis is required, the file will be forwarded to Underwriting. Desjardins Insurance will **send the policyowner a letter informing them that their coverage under any temporary or conditional insurance agreement has been terminated, if applicable.**

Considering the potential impacts of a change to insurability conditions, it's in the interest of the policyowner and proposed insureds to inform Desjardins Insurance of any changes to avoid problems when making a claim.

These documents along with a reference guide are available on Webi, under Forms > Insurance > [Administrative forms](#)

## **CUSTOMER SERVICE**

### **Individual Insurance**

#### **Attachment**

#### **Size      Type**

<a href="#">RG_Receipt_questionnaire_September2015_FINAL.pdf</a>	238.89 KB	application/pdf
<a href="#">11155E (15-09).pdf</a>	142.04 KB	application/pdf
<a href="#">14238E (15-09).pdf</a>	200.71 KB	application/pdf

**Source URL:** <https://trustglobalpacific.ca/bulletins/desjardins-insurance/2015-09-28/introducing-policy-delivery-receipt>