

BLAKE'S REVIEW PROCESS IDENTIFIES CLAIM OPPORTUNITY

“ I took out my insurance policy in the mid 1990s through a colleague, never actually believing I would need it. You know the type – nothing will ever happen to me!

Well, I had not really heard from my broker since taking out the policy, but in 2020 Mark from Blake Life and Risk through a curious chain of events became my nominated adviser. He called me out of the blue, to say hello and introduce himself. He said they would touch base and review the policy every year, on my policy anniversary, and I thought, ok no worries, I have heard that before.

Anyway several months later, Blake Life and Risk did phone to review the policy, and asked a few questions. I casually mentioned I have suffered from cancer many years ago, although I had fully recovered. I never thought to claim, as I was now completely back to normal.

In a flash the team was on to it, Mark suggested I lodge a claim, and see what happened. I was a little concerned about what it would cost me, how it would affect my policy, and how complicated the process would be. Mark talked me through the process, confirmed that it would not cost me anything, even if it was unsuccessful, and as my Adviser, it was what he did for all his clients. Service continued past just talking out the policy, it was around maintaining it, adjusted it as required and managing claims if required.

Mark duly got the claim documents, helped me complete the docs, told me what to get from my doctor, and then he dealt with the insurance company. When the insurance wanted more information, Mark explained and sent through the additional information required quickly!

And I got paid – a substantial amount! And my cancer was many many years ago. Could have knocked me over! What a great way to close out 2020.

It was great, totally unexpected, and I really appreciate everything Mark and his team did. If Blake Life and Risk are not your insurance brokers – they should be! I cannot recommend them highly enough!

Thanks Mark & the team at Blake Life & Risk Brokers.

Wayne 'Greeny' Green

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