



Australian Government

Assessment Requirements for FNSIBK404 Provide a claims service to an insurance broking client

Release: 1

Assessment Requirements for FNSIBK404 Provide a claims service to an insurance broking client

Modification History

Release	Comments
Release 1	This version first released with FNS Financial Services Training Package Version 1.0.

Performance Evidence

Evidence of the ability to:

- follow organisational procedures to complete a claims register accurately and process client claims
- provide the client with accurate and easily understood advice regarding contract terms and conditions and insurance procedures
- prepare a report on the settlement offer for client review
- research appropriate service providers for provision of claims services.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- explain the application of the brokerage claims systems and procedures
- explain the responsibility of the adviser in the claims process
- outline the process for analysing insurance contract terms and conditions in relation to the claims process
- explain the relevant legislation and code of practice requirements that are to be met by the adviser dealing with client claims.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the insurance broking field of work and include access to:

- common office equipment, technology, software and consumables
- organisational records

- organisational policy and procedures.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=c7200cc8-0566-4f04-b76f-e89fd6f102fe>