



CLIENT INTAKE FORM

Let's start with the basics.

To legally represent you, we need to confirm your property details and make sure this claim matches state-specific requirements.

CLIENT/INSURED(S)		
Full Legal Name(s) <i>(exactly as shown on policy)</i> :		
Property Address:		
City:	State:	Zip:
Phone Number:		Email:

We're only licensed to represent property owners. If you're a renter, your coverage would come through renter's insurance.

Tell us about what happened.

The more we know about the event, the faster we can determine if it falls within your policy and file it in a timely manner.

LOSS INFORMATION		
Loss Address, if different:		
City:	State:	Zip:
How Long has it been since the loss?		Date of Loss, if known:
<input type="checkbox"/> Less than 30 days	<input type="checkbox"/> 31 – 90 Days	<input type="checkbox"/> Over 90 days
Claim Type: <input type="checkbox"/> Emergency ① Damage is recent and still causing active issues (e.g., water intrusion, roof collapse, or fire). These claims often need urgent response and documentation and may require emergency mitigation before we can move forward.	<input type="checkbox"/> Non-Emergency ① The damage has occurred, but the situation is now stable and safe. These are the easiest to review and proceed with and often allow for the cleanest file and strongest representation.	<input type="checkbox"/> Supplemental ① The insurance company already paid or closed the claim, but you believe they missed or underpaid for damage. We'll need to review the prior estimate and payment and confirm that no waiver was signed, or check cashed that might limit your rights.
We need to confirm that the damage you're reporting is typically covered under your insurance policy.		
Type of Loss: <input type="checkbox"/> Fire <input type="checkbox"/> Freeze <input type="checkbox"/> Wind/Hail <input type="checkbox"/> Lightning <input type="checkbox"/> Tornado <input type="checkbox"/> Flood <input type="checkbox"/> Hurricane <input type="checkbox"/> Other <i>(please explain)</i> :		

Most policies require the policyholder to take steps to prevent further damage. This question helps us document what's been done, or what may still be needed, and can affect claim eligibility.

What have you done to prevent further damages?

<input type="checkbox"/> Nothing	<input type="checkbox"/> Other <i>(please explain)</i> :
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**Where are you in the claim process?**

Some clients have already started working with their insurance company. That's okay — we'll meet you wherever you are in the process.

INSURANCE CARRIER(S)	
Insurance Company:	Policy Number:
Claim Number:	<input type="checkbox"/> I have not filed a claim yet.
Claim Status: <input type="checkbox"/> Not Filed ① You haven't contacted the insurance company yet or opened a claim file. That's totally fine, this is often the best time to engage a Public Adjuster so we can handle it correctly from the start. <input type="checkbox"/> Filed-No Response ① You've submitted a claim but haven't heard back or received an inspection. We can step in to ensure your file moves forward and is documented correctly. <input type="checkbox"/> Underpaid ① The carrier sent a payment, but it's not enough to cover the damage. We'll review their estimate and advocate for what you're truly owed. <input type="checkbox"/> Denied ① Your claim was denied by the carrier. We'll need to carefully review the denial letter and all communications to determine if we can move forward. <input type="checkbox"/> Paid but Not Satisfied ① You received payment, but it feels incomplete, rushed, or inaccurate. We can help assess if a supplement is possible and negotiate a better outcome.	
Has the insurance company offered a settlement?	<input type="checkbox"/> Yes <input type="checkbox"/> No
If you received a check from the insurance company, did you cash it?	<input type="checkbox"/> Yes <input type="checkbox"/> No
<i>Some insurance checks contain language that limits your ability to request more money if cashed. This question helps us determine whether your claim is still eligible for review.</i>	
Do you have your most recent insurance policy declarations page?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you have photos and/or videos of the damage?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you have	<input type="checkbox"/> Yes <input type="checkbox"/> No

A few final questions to help us match you with the right adjuster.

We ask these to determine how to best support you, and whether there are any red flags or extra steps needed before proceeding.

Have you worked with a PA, contractor, or attorney on this claim before?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Has your insurance carrier sent an adjuster yet?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Is the property currently habitable?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are you comfortable with the Public Adjuster handling all aspects of the claim?	<input type="checkbox"/> Yes <input type="checkbox"/> No

Thank you for choosing TrueHaven Claims Consulting. We're on your side, and here to help you recover with confidence.