ARASH LAW
INJURY LAWYERS

INSURANCE CLAIM REVIEW

Consultation Worksheet

Compare the insurer's explanation with your records. Fill in what you can.
You can seek legal help even if parts of this worksheet are incomplete.

1 Insurance details

Insurer: _____

Claim number: _____

Policyholder: _____

Your connection to the policy: _____

ASK THE ATTORNEY
Is this my coverage or someone else's? What is missing?

2 Why did the insurer say no?

Reason given: _____

Policy term cited: _____

Bring: Denial letter, emails, policy pages.

ASK THE ATTORNEY
Is the issue coverage, fault, or claim value?

3 Payment in dispute

Payment or benefit: _____

Amount (if known): _____

Bring: Medical, wage-loss, or vehicle records.

ASK THE ATTORNEY
Does this affect one payment or the whole claim?

4 Facts still unclear

Missing details: _____

Information from others: _____

Bring: Reports, photos, and witness details.

ASK THE ATTORNEY
What needs investigation and why?

5 Insurer's requests

Records requested: _____

Response date: _____

Sent / still needed: _____

ASK THE ATTORNEY
What must I provide? Are any deadlines near?

6 Scope of legal help

Included / excluded services: _____

Fees and costs: _____

Other counsel needed: _____

ASK THE ATTORNEY
Who handles the claim, dispute, and deadlines?

Other questions for my consultation

_____

_____

_____

_____

Documents I still need

_____

_____

_____

_____

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Preparation resource only. This worksheet does not create an attorney-client relationship.