

Consultation record

(must be sent to ÖKK within 14 days of the consultation)

Location and date of consultation: _____

Customer data

Last name and first name	Date of birth	Street, no.	Post code and place

Advisor(s)

Company: _____

First name, last name: _____

Broker number: _____

Confirmations

- The customer and broker confirm that the consultation did not arise as a result of a telephone cold call*.
- The customer confirms that the broker has informed them of the following contents of the broker relationship (information obligation in accordance with the Insurance Supervision Act, Art. 45 ISA):
 - identity and address of the broker;
 - whether the offered insurance cover comes from one or more insurance companies and which insurance companies these are;
 - the contractual relationships of the broker with the insurance companies for which they are acting as well as the names of these companies;
 - who can be held liable for any errors or incorrect information in connection with their brokerage activities; and
 - the reasons for the processing of personal data (particularly the objective, scope, data recipient, storage of data).

* A cold call is considered a call that was made without the prior consent of the person receiving the call.

Signatures

Place and date: _____

Signature(s) (of all adult customers present at the consultation):

Signature(s) of advisor(s):
