

**Shepherds  
Friendly**

Your modern mutual



## **Your guide to Tele-Interviews**

Thank you for your application for the Shepherds Income Protection Plan with Shepherds Friendly. To process your application as smoothly and as quickly as possible, we have arranged for a specialist nurse to telephone you and interview you about your health.

You do not have to do anything until your tele-interview. A nurse from a specialist provider called MorganAsh will contact you for the interview. If you are not free to answer the questions when called, they will be happy to arrange a more suitable time. Please note that the calls will be recorded.

# What is a Tele-Interview?

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A tele-interview is an interview conducted over the telephone by a nurse. The interview will gather details of your health and medical history. All MorganAsh tele-interviewers are experienced nurses, so you can rest assured that the interview will be conducted in a confidential and professional manner.

A series of questions about your health, lifestyle and your immediate family medical history will be asked, and the interview generally takes between 20 to 40 minutes.

# What do I need to prepare?

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To prepare for your interview, please take some time to gather the following information and have this to hand when MorganAsh call:

- Any medication you are currently taking (including the name and dosage).
- Any past or present medical condition suffered (other than very minor ailments such as the common cold.)
- Any tests or investigations, e.g. blood pressure, cholesterol tests. It would be helpful if you phone your GP or whoever did these tests, to get the results.
- Details of any serious condition, such as cancer, heart attack, stroke, suffered by a member of your immediate family (your mother, father, brothers or sisters, or half brothers and sisters.)
- We will ask for your height and weight. If you do not know your weight, please try and weigh yourself prior to the interview.

If you are not sure whether something is important, then it is best to mention it. The nurse will assist you with any questions you may have.

## Why are you being interviewed?

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To offer Shepherds Friendly customers the best possible terms for their insurance, it is essential that a clear understanding of your present state of health and any conditions you may have suffered in the past is obtained so that claims can be processed quickly and efficiently. This information is used in our risk assessment, prior to considering your insurance cover.

Please accept our assurances that the information you provide will be treated in the strictest confidence, and only in the assessment of your application, and will only be seen by Shepherds Friendly underwriters and their managers.

## How will you be contacted?

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MorganAsh will contact you to arrange a suitable time for the interview. If you have not been contacted within three days or have been away or out of touch, you should contact MorganAsh on the Freephone number **0800 316 0701**. Unfortunately, your application for insurance can not be processed until the interview has taken place.

The nurses are able to undertake interviews from:

**9am to 9pm** Monday to Thursday

**9am to 5pm** Fridays

**10am to 4pm** Saturdays.

If you have call barring on your phone, please arrange for this to be removed to allow them to phone you. If the call barring cannot be removed, please call MorganAsh on the above number.

It is important that you are able to speak freely and have the time to spare to complete the interview. It is better not to conduct the interview over a mobile phone, but if this is your preference, we will do so. We will not complete an interview if you are driving.

# What happens after the interview?

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You will be sent a copy of the questions and your answers for you to check, ensuring that the information is complete and accurate. This copy should be signed, dated and returned to Shepherds Friendly in the reply paid envelope provided. Please return this promptly, Shepherds Friendly will not be able to process your application without your signed agreement to the interview.

If you feel that you need to change or add anything to the interview notes, then please correct the report prior to signing and returning it to Shepherds Friendly.

In some cases we may need further medical information from your doctor or through a medical examination, and this may take some time to arrange. Otherwise, all being well, you will receive your policy documents shortly after completion of the telephone interview.

## Why is it important I provide the right information?

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The interview forms an important part of your contract and is recorded. All the questions should be answered fully and honestly, as failure to do so could invalidate your policy and any future claims. It is in your best interest to answer all questions with due care as the information lasts for the length of the policy and you only need to do this once at application stage and at any subsequent change to your plan.

Should you have any general questions relating to your application, Shepherds Friendly can be contacted on **0161 495 6434**.



to make members  
feel valued

to remain mutual  
when in our  
members interests

to provide simple,  
value for money  
financial solutions

to be a place  
where people  
want to work

We believe that mutuality is the best way of providing maximum benefit to our members and at the heart of the Society we have the mutual core values of trust, mutual benefit and ownership. We ensure that the money you invest with us is treated in a responsible and sensible manner to give as good a return on your investment as possible.

**The Shepherds Friendly Society Limited** Registered Office: Haw Bank House, High Street, Cheadle, Cheshire SK8 1AL.  
Tel: 0161 428 1212 Fax: 0161 428 3666 Email: [info@shepherdsfriendly.co.uk](mailto:info@shepherdsfriendly.co.uk) Web: [www.shepherds.co.uk](http://www.shepherds.co.uk)

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The Head office and Registered office of The Shepherds Friendly Society is based in the United Kingdom.