

PRE-CLIENT INTAKE PACKET

Today's Date:	Date of Loss:	Status Date:	Account:	Type:
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Insured #1:

Contact #1:

Email #1:

Loss Location:

Mailing Address:

Insured #2:

Contact #2:

Email #2:

Site Access:

Situation:

New Loss <input type="checkbox"/>	Contents Inventory <input type="checkbox"/>	Claims Dispute <input type="checkbox"/>	Appraisal Demand <input type="checkbox"/>
SIU/EUO/Attorney Referral <input type="checkbox"/>	Stuck/Stalled/Stymied <input type="checkbox"/>		

Type of Claim:	Cause of Loss:
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Insurance Company Information:

Insurance Company:	Claim #:	Policy #:
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Policy Limits:

Structure:	Contents:	Loss of Use/Additional Living Expense:
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Claim Participants:

	Name	Cell#:	Office#:
	Email:		
	Company/Firm:		
	Street Address:		

	Name	Cell#:	Office#:
	Email:		
	Company/Firm:		
	Street Address:		

	Name	Cell#:	Office#:
	Email:		
	Company/Firm:		
	Street Address:		

Tell us about your claim (any information not already noted on this form that you think we should know):

The following documents will be helpful for us to determine the right claims service for your situation:

Insurance policy with declarations page

Structural repair, cleaning, and mitigation estimates

All contents inventories: insurance companies, your own list, or cleaners

All pertinent communication: letters, emails, copies of payments issued, etc.

SERVICES FEE SCHEDULE

Insurance Appraisal Services

\$295/hr

ICDR, Inc. professionals serve on insurance appraisal panels as appraiser for policyholders and/or insurance companies, umpire, arbitrator, or mediator. This hourly rate is charged for all work relating to the claim and/or appraisal process including, but not limited, to pre-hearing preparation, as many hearings as required, post-hearing follow-up, mediation, litigation, and travel time. Pursuant to insurance policy provisions, each party to the claim dispute pays their own appraiser, and the cost of the umpire service is split equally between the policyholder and the insurance company.

Contents Inventory Services

\$100/hr

The contents inventory process will be tailored to each specific claim and loss situation, which will include some or all of the following services: onsite inventory, guided memory (talk-out) inventory, inspection and evaluation of cleaned and/or cleanable contents, transcription, pricing, actual cash valuation (including, but not limited to depreciation, fair market valuation, and estimation of collectible values), and/or comprehensive analysis of existing contents inventory lists whether generated by vendors, cleaners, policyholders, or insurance companies.

Claims Consultation & Expert Witness

\$295/hr

Insurance claims services include investigation, evaluation, analysis, negotiation, mediation, litigation support, expert and witness testimony, and claims management. Hourly charges for these services include preparation, travel time, depositions, records production, and pre- and post- trial conferences.

Public Adjuster

12% Contingency

Public Adjusting services are available on a contingency fee or hourly (see claims consultation above) basis for those insurance claims wherein a policyholder requires professional assistance and/or technical expertise in presenting their claim. Please note that upon submission of a proof of loss and/or any other settlement demand, hourly charges may be billed in addition to any contingency fees.

Administrative/Clerical Services

\$80/hr

Administrative and clerical costs are charged for extraordinary claim file projects and production; including, but not limited to, duplication of claim documentation, research, and collection efforts. These fees are in excess of other services.

Extra Expense & Mileage

Actual Costs

Extra expenses may include, but are not limited to, travel (airfare, car rental, hotel, and meals), conference room, parking, copying, and delivery. Mileage will be billed at current year's IRS rate (2016=\$.54/mile).

Deposit

ICDR, Inc. requires a \$2,500 deposit before commencement of services. This deposit will be applied towards the final invoice. The deposit can be paid in-full, or in three (3) monthly installments of \$833.33 plus a 2.7% transaction fee. In the event ICDR, Inc. is acting as Umpire, the \$2,500 deposit is split equally between the parties.

Preferred Vendor Discount

Ask how you can qualify for the ICDR, Inc. preferred vendor and/or volume discount on assessment services and principal fees.

Cancellation Policy - If you notify our ICDR offices of appraisal cancellation, the canceling party or parties will dg't gur qpukdg'ht "cmCfo kpkat c'xg'Hggucpf "ej cti gu'ht "J gctkpi 'rt grctc'kqp'crt gcf { 'r gt hqt o gf "d { 'ÆFT"cpf vj glt 't grt gugpvc'kxgu'OKl'vj gt g'ku'c'erc'ko 'igwngo gpv'rtkqt 'v'vj g'Cr rtckucn'J gctkpi . "cm'lggu'y knldg'dknf 'kp" ceeqtf cpeg'v'vj glt 'ci t ggo gpv'y kj 'ÆFT0

SERVICES AGREEMENT

Insured: _____ Insurance Co.: _____

Policy #: _____ Claim #: _____ Date of Loss: _____

Loss Location: _____

Services: Client grants ICDR, Inc. dba: Claims Dispute Resolution and/or assigns the authority to proceed with providing:

☐ **Appraiser/Umpire** ☐ **Contents Inventory** ☐ **Claims Consultation**

☐ **Public Adjuster** ☐ **Micro-Consulting**

Services in this matter as deem appropriate. ICDR, Inc. dba: Claims Dispute Resolution agrees to keep Client informed of all significant developments. Client agrees to cooperate with and to aid ICDR, Inc. dba: Claims Dispute Resolution in the performance of the services.

Appraiser/Consultation Services: Client agrees to pay appraisal fees. Appraisal fees do not include costs, which are discussed below. Appraisal fees will be based on the number of hours spent on Client's behalf. Appraisers'/Umpire billable time shall include all time spent by, including but not limited to, research and analysis, communication (with Client, counsel, and parties), inter-office consultation, drafts and revisions of documents, travel time, and all other activity relevant to representation. Presently, appraisers'/umpire time is billed at the rate of **\$295 per hour** in 15 minute increments and any administrative time is billed at the rate of \$80.00 per hour in 15 minute increments.

Contents Inventory: Client agrees to pay all contents inventory fees. Contents inventory fees do not include costs, which are listed below. Contents inventory fees will be based on the number of hours spent on Client's behalf. Inventory specialist billable time shall include all time spent by, including by not limited to, research and analysis, communication (with Client, and experts), inter-office consultation, drafts and revisions of documents, travel time, and all other activity relevant to service. Inventory specialists' time is billed at the rate of **\$100 per hour** in 15 minute increments and any administrative time is billed at the rate of \$80.00 per hour in 15 minute increments.

Public Adjuster Fees: Client hereby assigns **12%** of the gross recovery from Client's insurance company to ICDR, Inc. dba: Claims Dispute Resolution. Client acknowledges that this assignment allocates any proceeds from this claim to pay the outstanding billing of ICDR, Inc. dba: Claims Dispute Resolution for services under the insurance contract with (see next page). Client understands and agrees that any legal fees, and/or extraordinary expenses are Client's responsibility. *Hourly consultation and witness charges apply after submission of the claims documentation.

Micro-Consulting Services: Client agrees to pay micro-consulting fees. These fees will be based on the number of hours spent communicating with the Client, and on behalf of the Client, including teleconferences, email messages, document review, and meetings. Consulting time is billed at the rate of **\$295 per hour** in 15 minute increments and any administrative time is billed at the rate of \$80 per hour in 15 minute increments. Fees will be billed and paid through PayPal unless other arrangements have been agreed. See *Payment of Fees and Costs* below for additional information on ICDR, Inc.'s billing practice.

Administration: Charges of **\$80 per hour** are applied to extraordinary claim file projects including documentation duplication, research, collection efforts, phone calls, etc.

Costs: Client agrees to pay all costs. Costs are out-of-pocket expenses such as photocopying costs, travel and lodging costs, courier costs, long-distance telephone charges.

Use the Tab button to navigate this form.

Payment of Fees and Costs: Client agrees to pay all Service fees and costs in full within 30 days of receipt of the itemized monthly bill for services rendered and costs incurred. If any monthly billing remains unpaid thereafter, a late charge shall be made at the rate of one percent (1.5%) per month on the outstanding balance, until paid. If the full balance remains outstanding after 90 days, the account will be turned over to collections. If Client questions in good faith any item or items in any given itemized monthly billings, Client may withhold payment for that item or items only, until that question is reasonably resolved. Payment of the disputed sum, or of any adjustment thereof, shall be due within ten (10) days after resolution, with the service charge to be imposed thereafter. It is further understood and agreed that in the event there is a dispute between Client and ICDR, Inc. dba: Claims Dispute Resolution concerning the performance of any provision of this agreement, the prevailing party shall be entitled to recover all reasonable costs incurred in connection with the dispute, including court costs, appraisal fees, and other dispute-related expenses. ICDR, Inc. dba: Claims Dispute Resolution requires a \$2,500 deposit which will be applied towards the final invoice. The deposit can be paid in-full, or in three (3) monthly installments of \$833.33 plus a 2.7% transaction fee.

_____ Pay-in-Full

_____ Pay 3 monthly installment

Client's Right to Terminate Contract: Client is entitled to terminate this contract at any time, with or without cause, subject to applicable rules of the insurance policy and payment of all fees and costs.

ICDR, Inc. dba: Claims Dispute Resolution's *Right to Terminate Services:* ICDR, Inc. dba: Claims Dispute Resolution has the right to terminate services at any time, subject to rules of the insurance policy and the Code of Professional Responsibility. Client acknowledges ICDR, Inc. dba: Claims Dispute Resolution's right to terminate services if Client disregards any of the terms of this contract, including timely payment of all fees and costs or full cooperation in pursuing the matter.

Representations: Client acknowledges that ICDR, Inc. dba: Claims Dispute Resolution has made no representations or guarantees regarding the successful resolution of this matter and that all statements relating to the likelihood of success are statements of opinion only.

Date of Commencement of Services: Client acknowledges that ICDR, Inc. dba: Claims Dispute Resolution services will not commence until Client has returned a signed copy of this contract and the \$2,500 deposit, except for those instances wherein ICDR, Inc. dba: Claims Dispute Resolution specifically agrees to take immediate action prior to payment.

I ACKNOWLEDGE THAT I HAVE READ BOTH PAGE 1 & 2 OF THE FOREGOING CONTRACT FOR SERVICES AND UNDERSTAND THE CONTENTS OF THIS AGREEMENT.

Client Signature & Date

Client Signature & Date

Accepted by ICDR, Inc. dba: Claims Dispute Resolution & Date

RETAINER NOTICE

Insured: _____

Insurance Co.: _____

Policy #: _____ Claim #: _____ Date of Loss: _____

Loss Location: _____

Please note that I/we, _____, are retaining

ICDR, Inc. dba: Claims Dispute Resolution to:

- ☐ Assist us in **preparing and presenting our contents inventory** as regards the above-mentioned loss.
- ☐ Assist us in **presenting and/or resolving our claims** as regards the above-mentioned loss.
- ☐ Naming **ICDR, Inc. dba: Claims Dispute Resolution** to act as our **appraiser** as regards the above-mentioned loss.

Please direct all communication and correspondence as regards this matter to:

Roger Howson

ICDR, Inc. dba: Claims Dispute Resolution

1455 NW Leary Way, Suite 400

Seattle, WA 98107

206.489.5241

Rhowson@ICDRinc.com

I hereby authorize **ICDR, Inc. dba: Claims Dispute Resolution** to be named as a loss payee on all contents payments issued by you in settlement of this claim. However, this assignment of proceeds is not an indication of any financial interest in the outcome of the above-referenced claim settlement.

Insured Signature & Date

Insured Signature & Date

Don't forget to save a copy of this COMPLETED form for your records and then attach a copy to an email and Email to: bhollibaugh@ICDRinc.com
