



Caterpillar Insurance Company  
 2120 West End Ave  
 P.O. Box 340001  
 Nashville, TN 37203 - 0001  
 1-800-248-4228

## POLICYHOLDER CANCELLATION REQUEST FORM

ALL FIELDS ARE REQUIRED

Policyholder Name (as stated on policy): \_\_\_\_\_

Mailing Address: \_\_\_\_\_

City/State/ZIP: \_\_\_\_\_

Phone: \_\_\_\_\_

Cat Financial Contract # (if applicable): \_\_\_\_\_

Policy Number: \_\_\_\_\_

Equipment Serial #: \_\_\_\_\_

Requested Cancellation Date: \_\_\_\_\_

**Reason for Cancellation (select one):**

- Trade-In (Provide Dealer Invoice)
- Selling Equipment (Provide Bill of Sale)
- Other Insurance Coverage (Provide Certificate of Insurance)
- Policyholder Request (If the equipment and insurance were financed through Caterpillar Financial Services Corporation (CFSC), additional supporting documentation may be required.)

**Distribution of Unearned Premium Refund (select one):**

*\*\* Please review the FAQs on page 2 for further explanation of the distribution of unearned premium. If no selection is indicated below, the distribution of the unearned premium will default to Named Policyholder.*

- Named Policyholder** – If you financed your equipment and insurance through CFSC and your contract has not been paid-in-full, you will continue to be billed for their balances under the terms of your contract.
- CFSC** – If you financed your equipment and insurance through CFSC, this selection will apply the refund towards the remaining insurance balance of your contract.
- Dealer**  
 Dealer Name: \_\_\_\_\_
- Cat Card**  
 Account Number: \_\_\_\_\_

The undersigned certifies that:

- No claims of any type will be made against the policy above for losses occurring after the date of cancellation.
- Any adjustment to the premium will be made in accordance with the policy terms and conditions.

Policyholder / Authorized Representative:      Signature: \_\_\_\_\_      Date: \_\_\_\_\_

Print Name: \_\_\_\_\_      Title: \_\_\_\_\_

**Do not** mail this form with your payoff check. Please sign and return the completed form to [NABC.Insurance@cat.com](mailto:NABC.Insurance@cat.com)



## Frequently Asked Questions

### 1. How do I find my policy number?

Your policy number is shown at the top of the declarations page on your Physical Damage Insurance policy. It can also be found on your CFSC finance contract by locating the last 8 digits of the Cat Financial contract number. (e.g., Contract #: 001-01234567; Policy #: CIC-01234567).

### 2. How may my unearned premium be applied/refunded?

- If you financed your equipment and the insurance premium through Cat Financial and have an outstanding balance on your Cat Financial contract, please select CFSC for the distribution of unearned premium. The CFSC selection will apply the refund towards the remaining insurance balance of your Cat Financial loan or lease. For other selections, you will continue to be billed for the insurance balance through the expiration date of your Cat Financial contract.
- If you are trading in your machine to a Cat dealer and you financed your equipment and insurance premium through Cat Financial, please consult your dealer for the appropriate selection.
- In event of default and repossession, if you financed your equipment and the insurance premium through Cat Financial and have an outstanding balance, the unearned premium may be forwarded to Cat Financial on your behalf, credited to you, and applied by Cat Financial to any unpaid balances on your account.
- If your insurance premium was financed through a premium finance company (other than Cat Financial), your premium refund will be refunded directly to the premium finance company.

### 3. How do I cancel my insurance policy?

All cancellation requests must be submitted in writing by completing the Caterpillar Insurance Company Policyholder Cancellation Request Form. The information provided on the insurance cancellation request form should match exactly with what is shown on the original policy documents. This includes the policyholder's name and address as shown on the policy declarations page, and the appropriate signature of the policyholder. For a policy to be cancelled effectively, the requested date of cancellation and the reason for cancellation are required.

### 4. The policyholder should remit applicable supporting documentation as detailed below:

- Proof of trade documents if the unit was traded in or sold to the dealership
  - Dealer invoice or purchase receipt
- Proof of the sale between the policyholder and the new owner if the unit was sold
  - Notarized Bill of Sale including date of sale, model, serial number, amount of purchase, and signatures of both parties
- Certificate of Insurance (proof of coverage) if alternate coverage is obtained through an outside insurance agency
  - Certificate of Insurance issued by agency with equipment model and serial number, effective date of coverage, and showing Caterpillar Financial Services Corporation as lien holder
- Documents if the Policyholder is deceased
  - Signature of the Executor/Administrator of the Estate on the cancellation request form
  - Death certificate and Executor/Administrator of the Estate documentation