

**GY Investigations & Legal Services**

License # PI 15959

Phone: 831-422-6671 Fax: 831-422-4970

Website: GYInvestigations.com E-Mail: GYII@worldnet.att.net

**REFERRAL FORM - INSURANCE INVESTIGATIONS**

Claimant: \_\_\_\_\_ Claim #: \_\_\_\_\_ Phone: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Occupation: \_\_\_\_\_ Is Claimant Represented by Counsel? Yes No

Social Security#: \_\_\_\_\_ Applicant Attorney: \_\_\_\_\_

Employer: \_\_\_\_\_ Date of Hire: \_\_\_\_/\_\_\_\_/\_\_\_\_

Employer's Address: \_\_\_\_\_ Date of Birth: \_\_\_\_/\_\_\_\_/\_\_\_\_

Contact Person: \_\_\_\_\_ Phone: \_\_\_\_\_

Date/Time of Injury/Illness: \_\_\_\_\_ Date/Time Reported: \_\_\_\_\_

Location of Injury: \_\_\_\_\_

Specific Injuries or Complaints: \_\_\_\_\_

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**Description of Services Needed:** [Please check all that apply]  
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**Type of Investigation**

- \_\_\_\_ AOE/COE
- \_\_\_\_ Statement (Only)
- \_\_\_\_ Background Check
- \_\_\_\_ Surveillance \_\_\_\_ Days
- \_\_\_\_ Activity Check \_\_\_\_ Days
- \_\_\_\_ Other

**Interviews**

- \_\_\_\_ Claimant
- \_\_\_\_ Supervisors
- \_\_\_\_ Witnesses
- \_\_\_\_ Coworkers
- \_\_\_\_ Third Party
- \_\_\_\_ Doctors
- \_\_\_\_ Others

**Background Records/Searches**

- \_\_\_\_ Medical Releases
- \_\_\_\_ WCAB Records
- \_\_\_\_ Court Records
- \_\_\_\_ Police Records
- \_\_\_\_ Personnel Records
- \_\_\_\_ Employment Background
- \_\_\_\_ Wage Records
- \_\_\_\_ Social Security Search
- \_\_\_\_ DMV Search
- \_\_\_\_ Other

Remarks: \_\_\_\_\_

Client: \_\_\_\_\_ Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Examiner: \_\_\_\_\_ Date Assigned: \_\_\_\_/\_\_\_\_/\_\_\_\_

E-Mail: \_\_\_\_\_ Date Due: \_\_\_\_/\_\_\_\_/\_\_\_\_

Defense Attorney: \_\_\_\_\_ Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

**Fax or Snail Mail completed form to:  
GY Investigations & Legal Services  
1172 South Main Street - PBM 355  
Salinas, CA 93901  
THANK YOU!**