

Financial Supplementary Statement for Personal Covers

This statement should be completed by the Proposed Insured/Policyowner

Proposed Insured	Date of Birth
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Please answer each question **truthfully, accurately** and **completely** and where appropriate, provide particulars.

1. What is the purpose of this life insurance proposal?

2. Have proposals been made concurrently to any other life insurance offices? If so, with what company/ies and for how much?

3. How much life insurance cover is presently in force on your life? Please indicate the reason for this cover.

Please answer the following questions if cover is required for family protection, investment or loan protection purposes.

4. Please give details of the income you received in the last tax year from:

- a) your own occupation
- b) investments
- c) other sources

5. What is your approximate net worth (i.e., assets minus liabilities)?

6. How many dependents do you have?

7. If a loan is being covered, please provide a copy of the loan agreement and indicate:

- a) the object of the loan
- b) the amount of the loan
- c) the duration and repayment conditions
- d) the name of the lender
- e) the name of the borrower
- f) whether the issue of a life policy is a condition of the loan and if immediate assignment will be arranged
- g) whether any other loans already exist; if so, please state the sums of the existing loans

Please answer the following questions if cover is required for inheritance tax purposes.

8. What is the estimated net worth of the estate? Please indicate how this is made up:

- a) assets/liabilities
- b) property
- c) mortgages
- d) investments
- e) loans
- f) others (please specify)
- g) total

9. What is the estimated inheritance tax liability and upon whom does this fall?

I hereby declare that the above answers and statements are true and complete.

Signature of Proposed Insured

Signature of Payor / Policyowner
(if other than Proposed Insured)

Date