



**Financial Questionnaire :**

Name of life to be assured : .....

Name of proposer (Where applicable) : .....

The information disclosed herein will be treated in the utmost confidence, If desired, this form may be sent direct to the Head Office at : .....

.....

**A. to be completed by the life to be assured .**

1. Income, Assets and Liabilities:

1. Income:

If an employee, state salary (before tax) : .....

If self-employed, state income from trade (including farming) as an individual, partnership or private company under the following headings :

Salary : .....

.....

Dividends : .....

Directors fees : .....

Interest on loans : .....

Share of retained profits : .....

**Other Income :**

Dividends (other than as above) : .....

Net Income from property : .....

Interest (other than as above) : .....

Other (Specify) : .....

1.2. Assets :

State your total assets (excluding life assurance) : .....

1.3. Liabilities :

State your total Liabilities : .....

1.4. Are you or your business insolvent at present ? .....

2. Insurance History :

1. State amounts of cover at present in force on your life under the following headings:

.....

Life cover (Including Pension death cover) .....

Accidental death cover : .....

Lump sum disability benefit : .....

Disability Income benefit : .....

2.2. Are there any proposals for life assurance on your life pending or contemplated ? If so, give details : .....

.....

2.3. What are the reasons for effecting the current assurance? (Where applicable the appropriate section below should be completed) : .....

.....

.....

.....

**B. To be complete by proposer is policy is to provide for key man assurance.**

1. Describe nature of firm's business : .....
2. Position of life to be assured in firm .....
3. What special knowledge does the life to be assured have, and why is the firm so dependant upon him or her ? Justify the amount of cover required if possible : .....
4. If the life to be assured is a shareholder, what is the current value of shares hole-by him or her ?  
What proportion of total shared does he or she hold ? .....  
On what basis are the shares valued ? .....
5. Does the firm hold or does it intend to effect policies on the lives of any other key personnel ?  
Give details : .....
6. Will the policy continue in force, and to whom will it belong, if the life to be assured leaves the firm ?.....

**C. To be completed by the proposer or life to be assured if policy is to be issued in connection with a buy and sell agreement .**

1. Describe the nature of firm's activities : .....
2. Annual profits of firm for last financial year : .....
3. Give details of any "buy and sell" agreement : .....  
date of the .....
4. What liabilities arise on the life to be assured ? or what basis is this calculated ? .....
5. To whom will the policy be ceded ? .....
6. Are policies being effected, or have they been, on the lives of other partners or shareholders ? .....

**D. To be completed by proposer or life to be assured if policy is to provide security for a loan.**

1. Nature of loan ..... Amount of loan .....  
When it repayable ? ..... Who is the lender ? .....  
Who is the borrower ? .....  
What other security is there for the loan ? .....
2. Why is the cover that is being applied for necessary ? .....
3. If the policy is to be company owned, what position does the life to be assured hold in the company ?.....  
What is the nature of the company's business : .....

I/We declare that the statements made above are true and agree that they, together with the application and other supporting documents, shall be the basis of the proposed policy.

Proposer : ..... Life to be assured : .....  
Date : ..... Date : .....