



\* Q U E S T I O N S \*



### Adviser Financial Questionnaire for Business Cover (Q21)

#### Particulars of Life Assured

Name : \_\_\_\_\_

Identity Card / Passport No. : \_\_\_\_\_ Contract No. : \_\_\_\_\_

#### Questions

1. Are you completing this form using information supplied by your client or from your own knowledge of his / her business or financial status?

\_\_\_\_\_  
\_\_\_\_\_

2. What is the purpose of this insurance?

Keyman protection                       Loan protection                       Employee benefit

Others, please specify: \_\_\_\_\_

3. How is the amount of Sum Assured derived?

\_\_\_\_\_

4. Please provide business details:

(a) Name of business: \_\_\_\_\_

(b) Nature of business: \_\_\_\_\_

(c) Business commencement date: \_\_\_\_\_

(d) Designation and duties of Life Assured: \_\_\_\_\_

(e) Percentage of Life Assured's ownership: \_\_\_\_\_

5. Is there any concurrent proposal(s) on the Life Assured?

Yes                       No

If 'Yes', please provide details of insurance (eg insurer, plan & amount of insurance cover).

\_\_\_\_\_  
\_\_\_\_\_

6. Please provide a brief account of the Life Assured's home environment, business activities, lifestyle and reputation.

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7. Is there any other information which may be helpful to the underwriter?

Yes       No

If 'Yes', please provide details:

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**Declaration**

I declare that the information given is true and complete and that I have not withheld any material information that may influence the assessment of my client's application.

\_\_\_\_\_  
Name and Signature of Adviser

\_\_\_\_\_  
Date (dd/mm/yyyy)