

LIFE INSURANCE CORPORATION OF INDIA

-----DIVISION

ADM (Sales) Marketing Manager's Confidential Report.

Proposal No.....

Branch Office

INSTRUCTIONS:

1. This Report is to be completed where the Sum Proposed is in excess of Rs. 15 Lacs.
2. Before completion of the report the reporting official should satisfy himself regarding the identity of the proposer. He should meet him, preferably at his residence before completing the report. The reporting official should make independent enquiries about the life to be assured's health and habits, occupation, income, social background and financial position etc.
3. This report must be completed immediately after the enquiries are made:

1. Full Name of the proposer.....Age.....years.

Full Name of the life to be assured.....Age.....years.

Occupation:Exact nature of
duties/Business.....

Sum proposed.....

Full Address.....

2. Total previous insurance in force Sum Assured Rs.....

3. Total insurance premium per year for previous policies Rs.

4. (a) By whom were you introduced to the Proposer/ Life prop. (a).....

(b) Are you satisfied about the identity of the Life proposed (b).....

(c) Give marks of identification, in any (c).....

(d) Does the life proposed look older than the declared age (d)

(e) What is the educational qualification of the life to be Assured? (e)

(f) What is your assessment about the general state of health Of the life to be Assured? (f).....

(g) Has be any physical deformity of impairment? (g)

(h) Does your enquiry indicate his having suffered from any Illness or injury or undergone any operation or Hospitalisation or medical investigation in the past? If so Give details. (h)

5. Are you satisfied that no previous policy has lapsed within last Three years on the life of the proposer/life proposed, his family Member.

(The reporting official is expected to examine the entire family insurance portfolio)

6. (a) What is proposer's yearly income from All sources (before tax) (Give detailed, and accurate information about the nature of source)
- | | |
|-----------------------------|---------|
| (I) Employment: | Rs..... |
| (ii) Business or Profession | Rs..... |
| (iii) Agriculture | Rs..... |
| (iv) Investments | Rs..... |
| (v) Property | Rs..... |
| (vi) Any other source | Rs..... |
- (b) Give information about the Income, Insurance in force, and Total prem. Amounts per year for the family Members of the proposer.
- | | | |
|--|--------------------------|------------------|
| Total Yly. Income from All sources (Before Tax) | Total insurance in force | Premium per year |
|--|--------------------------|------------------|
- i) Father.
 ii) Mother
 iii) Wife
 iv) HUF

(If it is noticed that any earlier policies belonging to any one including the proposer's are financed from any of the HUF Funds, then give detailed information on the premium amounts so paid, which HUF finances the policies, or whose life the policies are so financed and what are the premium amounts)

- (c) Give information about the Income, Insurance in force, and Total prem. Amounts per year for the family Members of the proposer.
- | | | |
|--|--------------------------|------------------|
| Total Yly. Income from All sources (Before Tax) | Total insurance in force | Premium per year |
|--|--------------------------|------------------|

Sons

Daughters

- (d) Give the figure of Income Tax paid, Total Assets (excluding life assurance) & Total Liabilities of The proposer. Life Proposed & Family Members.

	Income Tax	Assets	Liabilities
i) proposer			
ii) Life proposed			
iii) Father			
iv) Mother			
v) Wife			

vi) Sons

vii) Daughters

(e) Is he or his business solvent?

(f) State full particulars of the documents
Verified (Remarks such as “as told by
The party, agent etc” will not be accepted.

7. (a) Is there anything in the Life to be Assured's occupation, financial or social position, personal habits or any other circumstances which might add to the risk? (a)

(b) Do you consider acceptance of the proposal as in order and recommend it as such? (b)

I hereby declare that the foregoing statements are true and correct and are made as a result of my detailed enquiries and on verification of documentary evidence.

Place:

Signature:

Date:

Name (Block Letters)

Designation

Address