

## PERSONAL FINANCIAL QUESTIONNAIRE

1. Full Name of the Life to be insured : \_\_\_\_\_

2. Please give details of occupation and state whether you are employed, self-employed, a shareholding director or in a part \_\_\_\_\_  
\_\_\_\_\_

3. Please give details of your personal earning for the past 3 years

Particulars	Year _____	Year _____	Year _____
Salary(including bonuses) or package			
Income from House Property			
Income from Business			
Income/Commission from Profession			
Share of Profit from Partnership Firms			
Dividends			
Interest from Tax Free Bonds			
Income from Export Firms			
Agricultural Income			
Other Income(Please give details)			
<b>TOTAL</b>			

### Q. Nos. 4 & 5 for Self-Employed Persons only

4. Business Details :

Name of Company/Partnership \_\_\_\_\_

Nature of Business \_\_\_\_\_

When was the business established \_\_\_\_\_

Number of employees \_\_\_\_\_

What percentage of the company's share capital does the life to be insured own \_\_\_\_\_%.

5. Please give details of the turnover, gross profit and net profit before tax for the last 3 years, and projected figures for the next financial year :

Year	Turnover	Gross Profit	Net Profit before Tax
Projected figures for next Financial year			

If a gross or net loss has been reported in these figures, please forward copies of the last 2 years accounts and an explanation of why the loss occurred.

Where information is unavailable due to recent formation of the company, please forward a copy of the current business plan including projections.

6. Please estimate the value of your assets and liabilities :

Assets	Rupees	Liabilities	Rupees
House/Apartment		Outstanding personal loans	
Land/Real Estate		Mortgages on property	
Bank Deposits(Fixed)		Other liabilities(Please Give details)	
Bank Deposits(Savings)			
Shares, Bonds(including RBI and Other Tax Free Bonds)			
Mutual Funds			
Post Office Savings (NSC, ,Indira/Kisan Vikas Patra,etc.)			
Vehicles			
Other(Please give details)			

**Declaration :**

I do hereby declare that the above statements are true and complete and agree that this Personal Financial Questionnaire together with proposal dated \_\_\_\_\_ shall form the basis of the contract between myself and the Corporation.

Signature of life to be insured

Signature of the Official filling in Special MHR.