

LIFE INSURANCE CORPORATION OF INDIA
Established by the Life Insurance Corporation Act, 1956
DELHI DIVISIONAL OFFICE-I

INSTRUCTION:-

Proposal No:

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.

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1. Full Name of the Proposer: Age:
Full name of Life to be assured: Age:
Occupation: Sum Proposed: Rs.
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 proposed? (a) By
(b) Are you satisfied about the identity of the life proposed? (b)
(c) Give marks of identification, if 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 he any physical deformity or impairment (g)
(h) Does your enquiry indicate of his having suffered from illness or injury or undergone any operation or hospitalization 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)?

- i) Employment : Rs.
- ii) Business or Profession : Rs.
- iii) Agriculture : Rs.
- iv) Investment : Rs.
- v) Property : Rs.
- vi) Any other source : Rs.

(b) Give information about the Income, Total Insurance in force, and total Premium amounts per year for the family members of the proposer.

	Yearly Income from all sources (Before Tax)	Total Insurance in-force	Premium per year
i) Father			
ii) Mother			
iii) Wife			
iv) H.U.F.: of self			
of father			

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

(c) Give information about the income, total insurance in force and total premium amounts per year for the children of the proposer.

Age (Years)	Yearly Income from all sources (Before Tax)	Total Insurance in-force	Premium per year
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Sons

- (i)
- (ii)
- (iii)

Daughters

- (i)
- (ii)
- (iii)

(d) Give the figures of Income tax paid ASSETS(excluding Life Assurance & Total Liabilities of the proposer/life proposed and family members:

	Income Tax paid	Assets	Liabilities
(i) Proposer			
(ii) Life Proposed			
(iii) Father			
(iv) Mother			
(v) Wife			
(vi) Sons -			
(vii) Daughters -			

(e) Is he or his business solvent? **YES**

(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?

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

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

Signature):

Name(Block Letters):

Designation:

Address: .

Place:

Date:

Name :
Address :

To
The Divisional Manager,
LIC of India,
Delhi Divisional Office-I,
New Delhi

Dear Sir,

Re: Proposal for Rs.
on the life of Shri

With reference to the above proposal submitted by me, I have to inform you as follows with regard to my income, insurance particulars etc.

1. My P.A. No. for income-tax is
2. My yearly income from all sources before tax is as particularized below:
- i) Salary Rs.
- ii) Dividends Rs.
- iii) Director Fees Rs.
- iv) Int. on Loans Rs.
- v) Share on retained profits Rs.
- vi) Net income from property Rs.
- vii) Any other income (Specify) Rs.
- viii) Agricultural income (Specify) Rs.
3. The total insurance on my life in force Is to the extent of Rs.
4. Total amount of insurance premium per Year for the above insurance is Rs.

I give below information about the income, total insurance in force, total premium amounts per year for my family members.

	Yearly Income from All sources	Total Insurance	Premium Per Year
i) Father
ii) Mother
iii) Wife
iv) Sons
v) Daughters

Yours faithfully,

(Name of the Proposer)