

Application No.:

Agent Confidential Report (For Internal Use)

Note: This has to be filled mandatorily by the BDM for application sourced by **Agency Channel**. And this document is used for internal purpose only.

1. Have you met the Proposer / Life to be Assured? ☐ YES ☐ NO
2. If you have not met the customer, have you spoken to the customer and obtained information directly from the customer ☐ YES ☐ NO
3. If you have not met the customer, have you spoken to the advisor and obtained information about the customer from the advisor? ☐ YES ☐ NO

Other Remarks (if any):

Company Representative's Signature

Name:

Designation: Employee Code:

Place:

Date: