

## FINANCIAL QUESTIONNAIRE

Application No:

Name of life to be assured:

Occupation:

1. Purpose of Insurance Cover:

1. Savings and Investment ☐ 2. Personal and/or Family protection ☐ 3. Employer - Employee ☐ 4. Housing Loan protection ☐

2. PERSONAL FINANCIAL INFORMATION (For the last 3 years including the current year):

(Please attach documentary proofs)

|                     | Year 20 | Year 20 | Year 20 |
|---------------------|---------|---------|---------|
| Income before taxes |         |         |         |
| Earned Income       |         |         |         |
| Bonus / Commission  |         |         |         |
| Other earned Income |         |         |         |
| Perquisites         |         |         |         |
| Unearned Income     |         |         |         |
| Tax free income     |         |         |         |
| Others (specify)    |         |         |         |
| Total ₹             |         |         |         |

3. Please give details of additional source of Income:

| Unearned Income |  | Tax Free Income  |  |
|-----------------|--|------------------|--|
| Dividend        |  | Agriculture      |  |
| Interest        |  | Export           |  |
| Rental          |  | Others (Specify) |  |
| Others          |  |                  |  |
| Total ₹         |  | Total ₹          |  |

4. Are you an Income tax Accesses:

Yes ☐ No ☐

If Yes, quote your Pan No:

| Assets                                                                        | ₹ | Liabilities          | ₹ |
|-------------------------------------------------------------------------------|---|----------------------|---|
| Cash/De posits/Certificates                                                   |   | Mortgage             |   |
| Investments NSC/UTI/PPF, Pensions Income stock broking / stock trading (in ₹) |   | Other personal loans |   |
| Other Savings                                                                 |   | Other Liabilities    |   |
| Business equity                                                               |   |                      |   |
| Residence/House Property Land (in Acres)                                      |   |                      |   |
| Place :                                                                       |   |                      |   |
| Agricultural / Non-agricultural                                               |   |                      |   |
| Personal / Cars etc                                                           |   |                      |   |
| Other                                                                         |   |                      |   |
| Total ₹                                                                       |   | Total ₹              |   |

Total ₹ \_\_\_\_\_

Date: 

|   |   |   |   |   |   |   |   |
|---|---|---|---|---|---|---|---|
| D | D | M | M | Y | Y | Y | Y |
|---|---|---|---|---|---|---|---|

Place: |

Signature of Life to be assured / Proposer: