

NB Checklist			
Date :	FA /CRO Code	FA /CRO Name :	
Branch name :			
Please ensure that all the sales relates codes are properly captured			
Area	Details	Yes	No
Application Form	All the Questions filled & overwriting/ whiteouts ---countersigned (initials Not Allowed)	☐	☐
Payin slip	Is the office copy of the pay in slip along with stamp & signed is attached to the proposal form	☐	☐
Age Proof	Std / Non Std Age Proof collected / In case of Non STD age proof , consent letter received	☐	☐
	DOB on proposal form should match with age proof & Signature of Life Assured / Proposer should be available on the age proof	☐	☐
	Age proof in vernacular language should be translated in English & signed off by CRO	☐	☐
Address Proof	Life Assured has ticked the preferred address for receiving all communications & Landmark, Pin code and at least one land line number written.	☐	☐
	Address Proof collected for mailing address , in case of permanent and mailing address are different > address proof collected for both the address	☐	☐
Identification Proof	Photo Identity Proof submitted	☐	☐
	In absence of Identity Proof, is customer photo Identify form submitted (for premium received more than INR 10,000)	☐	☐
Income Proof (For SA > 15 lac OR Premium > 1 lac)	Income Tax assessment orders / Tax returns / Employers Certificate, Audited accounts, CA certificate, Agricultural Income	☐	☐
	Certificate, Bank Statements, Pass-book, Bank statement, Agricultural-land details (indicative list)	☐	☐
Occupation	Occupational extra - On Basic & Accident rider as applicable/Consent Letter & questionnaire collected	☐	☐
Plan Details	SA mentioned in the application form matches with BI including all riders	☐	☐
	Fund Allocation written and adds up to 100%	☐	☐
Previous/ Simultaneous Policies	In case of previous / simultaneous Life Cover complete details written including all rider.	☐	☐
Family History / life style questions	Family History complete with health status been captured	☐	☐
	Life Style details of Life Assured completed with Quantity specified	☐	☐
Nominee or Proposer optioned correctly ticked	If Proposer is other than Life Assured , proposer details are completely written.	☐	☐
	If nominee is a minor, Appointee details written along with signature of Appointee.	☐	☐
Females Lives	In case of Female life to be assured correct occupation code is ticked as working / not working.	☐	☐
	In case of female life not working , Husband's Insurance Details, salary and occupation to be mentioned.	☐	☐
Minor Lives	Please collect School certificate if minor is studying in school/Birth Certificate,etc	☐	☐
	Parents insurance should be equal the sum proposed on minor	☐	☐
Questionnaires	Hypertension or Diabetes or Deformity or NRI.... etc as per the case	☐	☐
	Reports collected where applicable regarding previous illness	☐	☐
BI	Is Benefit illustration (BI) attached and signed by LA/Proposer	☐	☐
Pan Card	Is PAN card copy collected For INR One Lakh Premium and above.	☐	☐
Proposal Sign & Date	Life Assured / Proposer/Witness---- Sign, Name, Place, Date as applicable	☐	☐
	Vernacular declaration required if LA / Proposer signs other than English	☐	☐
	Declaration for signing vernacular language signed by LA/Proposer and witnessed by Advisor/Third Party	☐	☐
ACR	Confidential Report :Delegation	☐	☐
	In case the Life Assured is a relative of the CRO ,CCR has to be countersigned by BDM	☐	☐
FA/CRO Signature			