

## LARGE AMOUNT QUESTIONNAIRE

(To be completed by the applicant)

### PART I

#### 1. PURPOSE OF INSURANCE

- |   |   |
|---|---|
| <input type="checkbox"/> Family Protection        | <input type="checkbox"/> Keyman Insurance Protection        |
| <input type="checkbox"/> Estate Duties Protection | <input type="checkbox"/> Loan Repayment/Mortgage Protection |
| <input type="checkbox"/> Others (if give details) |   |

2. Please give details of any existing insurance including Life, Accident or Dread Disease covers in force with our company or other life insurance companies; or any concurrent application on Proposed Insured/Insured, family members and family associates\* (\* For business insurance only)

Policy Issue Date	Insurance Company	Name of Insured	Type of coverage	Amount of coverage (in US\$)

#### 3. INCOME DETAILS (in US\$)

Income of Last 3 Years	Year _____	Year _____	Year _____
(including all commission/bonuses):	_____	_____	_____
Unearned Income in the Past 12 months:	_____	_____	_____
Property Rental Income:	_____	_____	_____
Interest from Bank Deposit:	_____	_____	_____

#### 4. ASSETS

Residence (if owned)			
Date of Purchase:	_____	Purchase Price:	_____
Outstanding Mortgage:	_____	Current Value:	_____
Other Properties Owned			
Address 1:	_____		
	_____		
Date of Purchase:	_____	Purchase Price:	_____
Address 2:	_____		
	_____		
Date of Purchase:	_____	Purchase Price:	_____
No of Car(s) Owned:	_____	Model of the Car(s):	_____
Fixed Deposits:	_____	Shares:	_____
Other Assets	_____		_____
Details:	_____	Value:	_____

#### 5. FAMILY LIFE STYLE

No. of Dependents:	_____	Age and Relationship:	_____
No. of Maid/Driver:	_____		_____
Residential Property (if rented)			
Monthly Rental:	_____	Paid by:	_____

#### 6. LIABILITIES

Mortgage(s):	_____	Overdraft:	_____
Personal Loan(s):	_____	Others:	_____

#### 7. OCCUPATION

Name of the Company:	_____
Nature of Business:	_____

Commencement Date of the Business: \_\_\_\_\_  
 Insured's Percentage of Ownership of the Co: \_\_\_\_\_  
 Position Held and for How Long: \_\_\_\_\_  
 No. of Employees in the Company: \_\_\_\_\_  
 Authorized Capital: \_\_\_\_\_ Paid-up Capital: \_\_\_\_\_  
 Total Asset: \_\_\_\_\_ Total Liabilities: \_\_\_\_\_  
 Year \_\_\_\_\_ Year \_\_\_\_\_ Year \_\_\_\_\_  
 Business Turnover: \_\_\_\_\_  
 Gross Profit: \_\_\_\_\_  
 Net Profit: \_\_\_\_\_  
 Details of Other Businesses Owned  
 Name: \_\_\_\_\_  
 Turnover: \_\_\_\_\_ (this year) \_\_\_\_\_ (last year)  
 Net Profit: \_\_\_\_\_  
 Name: \_\_\_\_\_  
 Turnover: \_\_\_\_\_ (this year) \_\_\_\_\_ (last year)  
 Net Profit: \_\_\_\_\_

**PART II**

**1. FOR KEYMAN INSURANCE**

Please give reasons why the Proposed Insured/ Insured is considered to be so valuable to the company.

\_\_\_\_\_

Please specify how the sum assured was calculated.

\_\_\_\_\_

How many other executives are there at this or a higher level?

\_\_\_\_\_

Are or will other key employees have cover effected on their lives? If "yes", please give details.

\_\_\_\_\_

Total value of the Proposed Insured's/ Insured's current remuneration (Please submit income tax return for reference).

**2. FOR PARTNERSHIP INSURANCE**

What liabilities arise on the death of the Proposed Insured/Insured?

\_\_\_\_\_

Are policies effected on all shareholders/ partners? If "yes", please give details.

\_\_\_\_\_

What is the current valuation on the shares/ partnership? (Please submit Buy & Sell Agreement and current official valuation report for reference).

**3. FOR LOAN PROTECTION (Please submit Loan Agreement for reference)**

Purpose of Loan:  Business Loan  Personal Loan  Mortgage Loan

Name of Lender: \_\_\_\_\_ Name of Borrower: \_\_\_\_\_

Loan Amount: \_\_\_\_\_ Repayment Period: \_\_\_\_\_

Commencement Date of the Loan: \_\_\_\_\_

**DECLARATION**

I/We hereby declare that to the best of my/our knowledge, the foregoing statements are true and complete and such disclosures will form part of the basis of this Contract.

Signature of Proposed Insured/Insured: \_\_\_\_\_ Date (day/month/year): \_\_\_\_\_

Signature of Applicant/Owner: \_\_\_\_\_ Date (day/month/year): \_\_\_\_\_