

## PERSONAL FINANCIAL QUESTIONNAIRE

1. Full name of the life to be insured : \_\_\_\_\_
2. Please give details of occupation and state whether you are employed, a shareholding director or in a partnership  
 \_\_\_\_\_  
 \_\_\_\_\_
3. Please give details of your personal earning for the past 3 years

Particulars	Year _____	Year _____	Year _____
Salary (including bonuses) or package			
Income from house property			
Income from business			
Income / commission from profession			
Share or profit from partnership firms			
Dividends			
Interest from tax free bonds			
Income from export firms			
Agriculture income			
Other income (please give details)			
<b>Total</b>			

**4. Q.Nos. 4 & 5 For self-employed person only**

Business details:

Names of company partnership \_\_\_\_\_

Nature of business \_\_\_\_\_

When was the business established \_\_\_\_\_

Number of employees \_\_\_\_\_

What percentage of the company's share capital does the life to be insured own

\_\_\_\_\_ %

5. Please give details of the turnover, gross profit and net profit before tax for the last 3 years and projected figures for the next financial year :

Year	Turnover	Gross profit	Net profit Before tax

Projected figures for the next financial year			
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If a gross or net loss has been reported in these figures, please forward copies of the last 2 years account and an explanation of why the loss occurred.

Where information is unavailable due to recent formation of the company, please forward a copy of to the current business plan including projections.

6. Please estimate the value of year assets and liabilities :

<b>Assets</b>	<b>Rupees</b>	<b>Liabilities</b>	<b>Rupees</b>
House / Apartment		Outstanding personal loans	
Land / Real estate		Mortgages on property	
Bank deposits (fixed)		Other liabilities (please give details)	
Bank deposits (saving)			
Shares, Bonds (including RBI and other tax free Bonds)			
Mutual Funds			
Post office savings (NSC, Indira / Kisan Vikas Patra, etc.)			
Vehicles			
Other (please give details)			

**Declaration:**

I do hereby declare that the above statement are true and complete and agree that this personal financial Questionnaire together with proposal dated \_\_\_\_\_ shall form the basis of the contract between myself and the Corporation.

**Signature of life to be insured.**

**Signature of the official filling in special MHR**