

Life Insurance Division

Sales Executive's Confidential Report

Proposer Name		Sum Assured	
Address		Product	

Srl #	Questions	Answers
1.	i. How long have you known the proposer?	
	ii. Are you related to his/her? If so, how?	
2.	i. Are you convinced as to the identity of the life to be assured?	
	ii. How long has he/she been in the present employment?	
	iii. Is he/she a permanent employee?	
3.	i. What is the proposer's average monthly income	
	ii. Give actual figure according to your knowledge	
4.	i. What is the state of health of the life to be assured?	
	ii. Is there any deformity or particularity in appearance?	
5.	i. What is the objective of the proposed Insurance?	
6.	i. Are you aware of anything in the usual occupation financial or social position of the proposer or any other circumstance, which might be likely to add to the risk & to which special attention should be given when considering the proposal?	
7.	i. Do you recommend the life to be assured as for assurance?	
8.	i. Is the information correct to the best of your Knowledge?	

Signature of Sales Executive			
Name of Sales Executive			
Sales Executive Code		Mobile No.	
Place and Date			