

1. Before completion of the report the reporting official should satisfy himself regarding the identity of the proposer. He should meet him, preferably at his residence before completing the report. The reporting official should make independent enquires about the life to be assured's health and habits, occupation. Income, social background and financial position etc.
2. The report must be completed immediately after the enquiries are made

1. Full name of the proposer: _____

Proposer Age: _____

Relation with Life Assured: _____

2. Full name of the life to be assured: _____

Life assured date of birth & age: _____

Occupation: _____

Nature of duties: _____

Organization name: _____

Permanent Address: _____

3. Total previous insurance from all sources

Company Name	Policy No.	Sum Assured	Status – in force / surrendered / lapsed / other	Year of start of policy

4. To be filled by the Insurance company official

a. By whom were you introduced to the proposer / life proposed:

b. Are you satisfied about the identity of the life proposed:

c. Give identification mark if any:

d. Does the life proposed look older than the declared age:

e. What is the educational qualification of the life to be assured:

f. What is your assessment about the general state of health of the life to be assured:

g. Has any physical deformity or impairment:

h. Does your enquiry indicate his having suffered from any illness or injury or undergone any operation or hospitalization or medical investigation in the past? if yes give details: _____

5. Does your enquires indicate the life to be assured is having

- Suffered from any illness or injury:_____
- Undergone operation:_____
- Had hospitalization:_____
- Undergone medical investigation:_____
- If answered yes to any question , please give
details:_____
- _____

6. What is proposer's yearly income from all sources

Year	Employment	Business / Profession	Agriculture	Investment	Other sources of Income

7. Is there anything in the life to be assured's occupation, financial or social position, personal habits or any other circumstances which might add to the risk?

8. Was the life to be assured ever prosecuted or are there any prosecution pending against him Is there anything in the occupation, financial social position, personal habits or any other circumstances pertaining to the life assured, which might add to the risk?

In your opinion, is the risk acceptable and do you recommend acceptance of the risk

9. Do you consider acceptance of the proposal as in order and recommend in as such

Name: _____

Date: _____

Place: _____

(Signature of Level 6 and above)