

(To be filled by level 8 and above, source of information to be provided in required fields)

Proposal No: Advisor Code : Name of The Life Assured/Proposer Q1. Do you agree with the detailed ACR by advisor? ☐ Yes ☐ NoQ2. Are all the details provided are satisfactory of Life to be assured / Proposer? ☐ Yes ☐ No**A. Customer Profile Details**

|                           |  |
|---------------------------|--|
| Name of the customer      |  |
| Education                 |  |
| Annual income             |  |
| Social media check detail |  |

**B. Family Background, Income / Occupation Details**

| Family Member | Occupation | Designation/<br>Name of organization | Work experience | Approx Income (p.a.) | Source of information / Documents verified |
|---------------|------------|--------------------------------------|-----------------|----------------------|--------------------------------------------|
| Father        |            |                                      |                 |                      |                                            |
| Mother        |            |                                      |                 |                      |                                            |
| Spouse        |            |                                      |                 |                      |                                            |
| Children      |            |                                      |                 |                      |                                            |

**C. Business / Profession / Occupation of Life Assured / Proposer**

| Occupation    | Name of the Organization | Designation | Approx Income (p.a.) | Source of information / Documents verified |
|---------------|--------------------------|-------------|----------------------|--------------------------------------------|
| Salaried      |                          |             |                      |                                            |
|               |                          |             |                      |                                            |
| Professional  |                          |             |                      |                                            |
|               |                          |             |                      |                                            |
| Self Employed |                          |             |                      |                                            |
|               |                          |             |                      |                                            |

**D. Other Sources Of Income**

| Source of Income | # of Yrs of source | Approx Income (p.a.) | Source of information / Documents verified |
|------------------|--------------------|----------------------|--------------------------------------------|
|                  |                    |                      |                                            |
|                  |                    |                      |                                            |
|                  |                    |                      |                                            |
|                  |                    |                      |                                            |

**E. Property Details**

| Property              | Approx Area | Locality & Date of Purchase | Approx Mkt Value and Source of information |
|-----------------------|-------------|-----------------------------|--------------------------------------------|
| Flat / Bungalow       |             |                             |                                            |
| Shop / Commercial     |             |                             |                                            |
| Agricultural          |             |                             |                                            |
| Land Land (non-agri.) |             |                             |                                            |
| Others:               |             |                             |                                            |

**F. Asset Details**

| Car Model & Reg No.<br>Other assets | Date of Purchase | Approx Mkt Value | Source of information/<br>Documents verified |
|-------------------------------------|------------------|------------------|----------------------------------------------|
|                                     |                  |                  |                                              |
|                                     |                  |                  |                                              |
|                                     |                  |                  |                                              |
|                                     |                  |                  |                                              |

**G. Other Investment Details**

| Type of Investment | Market Value | Invested With | Source of information/<br>Documents verified |
|--------------------|--------------|---------------|----------------------------------------------|
| Mutual Funds       |              |               |                                              |
| PPF                |              |               |                                              |
| Insurance          |              |               |                                              |
| Fixed Deposits     |              |               |                                              |
| Others             |              |               |                                              |

**H. Average Bank Balance**

| Bank Details | Average Balance | Source of information/<br>Documents verified |
|--------------|-----------------|----------------------------------------------|
|              |                 |                                              |
|              |                 |                                              |
|              |                 |                                              |

**I. Recommendation Basis Profile**

\_\_\_\_\_

\_\_\_\_\_

I hereby declare that the foregoing statements are true and correct, this are made as a result of my detailed enquiries and on verification of documentary evidence.

Name: \_\_\_\_\_

Date: \_\_\_\_\_

Place: \_\_\_\_\_

\_\_\_\_\_  
Signature of the Level 8 and above