

Life Cover Financial Questionnaire

Please complete if the overall life cover applied for is more than £1,000,000.

Application number (if known) _____

Name of life covered _____

What is the reason for applying for this policy?

Reason for cover	Tick all that apply	Complete section
Personal or family protection	<input type="checkbox"/>	A & E
Inheritance tax (IHT)	<input type="checkbox"/>	A, B & E
Mortgage	<input type="checkbox"/>	A, C & E
Other reason (please give details)	<input type="checkbox"/>	A, D & E

▶ Section A

to be completed for all applications

Do you have any other life cover with another insurance company?

yes

no

If yes, please give details below

Company	Amount of cover	Policy Term	Start date	Reason for cover	Will this be cancelled if cover commences with The Exeter?

Are you making any concurrent applications with other insurance companies?

yes

no

If yes, please give details below

Company	Amount of cover	Policy Term	Reason for cover

Please give details of your dependents and their ages

Please give details of your gross annual earnings for last 2 years

	Current year	Previous year
Salary or package		
Dividends		
Bonuses / commission		
Share of profit		
Other (please give details)		
Total		

We can usually only offer the following amounts of cover

Age(s)	Up to 39	40 – 49	50 – 59	60+
Multiples of income	x20	x15	x10	x5

Please estimate the value of your assets and liabilities

Assets	Estimate	Liabilities	Estimate
Property		Personal mortgages	
Investments		Buy to let mortgages	
Others (please specify)		Loans	
		Others (please specify)	
Total assets		Total liabilities	

► Section B – inheritance tax provision

What is the estimated inheritance tax liability? _____

Please state any reliefs that will be available for mitigation of inheritance tax

Is the liability in respect of a gift?

yes no

If yes, please give details below of the date and value of the gift

▶ Section C – mortgage

Reason for cover (e.g. purchase, re-mortgage, improvement) _____

Original mortgage or loan amount _____

Remaining mortgage or loan term _____

Remaining mortgage or loan amount _____

Repayment method _____

Name of lender _____

Name of borrower _____

If anyone other than the applicant is named on the loan agreement please provide full details

▶ Section D – additional information to support your application

Please use this space to provide us with any further information

▶ Section E – declaration

I confirm that:

- The information given in this form has been provided truthfully and accurately
- I will immediately inform you if there are any changes to any answers given on this questionnaire before the policy starts
- I am aware that the information provided will form part of the legal relationship between us and if any of it is found to be incorrect it may mean that a claim is not paid or the policy(ies) is amended or cancelled

Signature _____

Date _____

Contact us

The Exeter, Lakeside House, Emperor Way, Exeter, EX1 3FD

Members

0300 123 3201

member@the-exeter.com

Financial Advisers

0300 123 3203

adviser@the-exeter.com

www.the-exeter.com

Calls may be recorded and monitored

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