

INSURED PROPOSAL DETAILS

Profession and position: _____ Date of hire: mm / dd / yy

Function within the company: functions and responsibilities: _____

KEY PERSON COVERAGE

Please provide the following information:

The key person's total remuneration package (salary and benefits) for the last three financial years:

YEAR	SALARY	BENEFITS

Why it is considered essential to the success of the company. Include details of skills, experience, qualities, etc. of the key person what make them "key". _____

How was the sum insured for the key person calculated: _____

If key person coverage has been contracted or is going to be contracted for other people.

If yes, fill out a form for each of them **YES** **NO**

Is this the only request for key person coverage for the proposed insured? If NO, please provide details of any other requests being submitted: **YES** **NO**

COMPANY	COVERAGE AMOUNT	POLICY TYPE AND TERM	REASON FOR THE POLICY



KEY PERSON QUESTIONNAIRE

Please list all other current life, critical illness, family protection or income protection policies:

COMPANY	COVERAGE AMOUNT	EFFECTIVE DATE	POLICY TYPE AND TERM	REASON FOR COVERAGE

DECLARATION

I confirm that the information contained in this form is true and complete to the best of my knowledge and belief and that I have not withheld any information that could influence the evaluation or acceptance of this application. I accept that this questionnaire will form part of the key person's insurance application and that the omission of any information may invalidate the contract.

Signature of the Legal Representative of the company: _____

Signature of the proposed insured: _____

Date: mm/ dd / yy

Send this Questionnaire duly completed along with the following documents:

1. Certificate of incorporation of the company.
2. Identification of the legal representative of the company.
3. Financial statements of the company for the last 2 years.
4. Company tax return for the last 2 years (when key person coverage is \$500,000 or greater).
5. Business plan and financial projections
6. Audit of the business by a certified accountant (when coverage is \$1,000,000 or greater).
7. Key person's personal tax return for the last 2 years (when an individual's coverage is \$250,000 or greater).