

HSBC Insurance (Singapore) Pte. Limited

10 Eunos Road 8, #11-01 Singapore Post Centre (South Lobby) Singapore 408600

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Company registration no. 195400150N



Proposal no.		Insurance Adviser's Confidential Report	
Adviser's name	Adviser's no.	Unit name	Adviser's mobile no.

Warning: There will be a delay in issuing the policy if the information given here is incomplete.

Name of policyowner/life insured	Full name as shown in NRIC/passport
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Part 1 Insurance adviser's relationship with client

1. The policyowner/life insured is

Existing client
 Cold call
 Walk-in client
 Friend
 Fellow insurance adviser's family member
 Roadshow
 Referred lead, relationship between referring party and policyowner/life insured _____
 Relative, relationship _____
 Others _____

2. You have known the policyowner/life insured for year(s) month(s) day(s)

Part 2 Know your client

3. a. Estimated current annual income _____

b. Estimated networth

Below \$100,000
 \$100,001 to \$500,000
 \$500,001 to \$1,000,000
 \$1,000,001 to \$2 million
 Above \$2 million

c. Source of wealth

Inheritance
 Investment
 Business/trade/employment
 Others _____

4. Purpose of the insurance (can tick more than one box)

<input type="checkbox"/> Personal <input type="checkbox"/> Living <input type="checkbox"/> Family <input type="checkbox"/> Business	<input type="checkbox"/> Savings <input type="checkbox"/> Protection <input type="checkbox"/> Children education <input type="checkbox"/> Keyman insurance	<input type="checkbox"/> Investment <input type="checkbox"/> Asset protection <input type="checkbox"/> Family income <input type="checkbox"/> Retirement planning <input type="checkbox"/> Estate conservation
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5. Source of premium

Own earnings/savings
 Spouse
 Parents
 Legacy
 Others
 Third party cheque/cashier's order/Giro/Credit Card

Third party's name & NRIC no. (to submit photocopy of third party's NRIC)	<input style="width: 100%;" type="text"/>
Relationship with policyowner/life insured	<input style="width: 100%;" type="text"/>
Reason for using third party cheque/cashier's order/Giro/Credit Card	<input style="width: 100%;" type="text"/>

6. Is the policyowner/life insured a potentially vulnerable customer? Yes No

If yes, please indicate the condition _____

Note: Please ensure adherence to the Potentially Vulnerable Customer Sales Process.

7. Is the policyowner/life insured a politician, a royalty, have any business interest apart from the occupation stated in the proposal form or a family member of any local or overseas politician or high ranking public official? Yes No

If yes,

a. name, rank/position held	<input style="width: 100%;" type="text"/>
b. country of appointment of the politician or public official	<input style="width: 100%;" type="text"/>
c. business interest	<input style="width: 100%;" type="text"/>

8. Please state below if you have any comments or any information (medical or otherwise) which you feel is not apparent from the proposal form which could affect the underwriting of this proposal.

Part 3 (Register of Policies) Policy owner is an Individual	
	Category (For Internal Use)
<p>Singapore citizen</p> <p><input type="checkbox"/> Currently residing permanently in Singapore</p> <p><input type="checkbox"/> Currently <u>NOT</u> residing in Singapore (Please complete the following)</p> <p><input type="checkbox"/> Continuously for 5 years and above¹ (to submit photocopy of documentary proof such as work or student permit issued by relevant authorities in the foreign country where policy owner is residing)</p> <p><input type="checkbox"/> Continuously for less than 5 years</p>	<p>Singapore</p> <p>Offshore</p> <p>Singapore</p>
<p>Singapore permanent resident</p> <p><input type="checkbox"/> Has resided in Singapore for a total of 183 days³ and more in the last 12 months</p> <p><input type="checkbox"/> Otherwise (to submit photocopy of passport including pages with immigration stamps or similar travel documents)</p>	<p>Singapore</p> <p>Offshore</p>
<p>Individual holding work pass or permit required under the Employment of Foreign Manpower Act (Cap. 91A)</p> <p>²Employment Pass / Personalised Employment Pass (PEP) / EntrePass / S Pass / Work Permit / Dependent's Pass / Long Term Visit Pass / Others (Please specify) _____</p> <p><input type="checkbox"/> Has resided in Singapore for a total of 183 days³ and more in the last 12 months</p> <p><input type="checkbox"/> Otherwise (to submit photocopy of passport including pages with immigration stamps or similar travel documents)</p>	<p>Singapore</p> <p>Offshore</p>
<p>Individual holding pass or permit required under the Immigration Act (Cap. 133)</p> <p>²Student Pass / Long Term Visit Pass / Short Term Visit Pass / Others (Please specify) _____</p> <p><input type="checkbox"/> Has a pass or permit that has a duration longer than 90 days and has resided in Singapore continuously for 90 days³ and more during the last 12 months</p> <p><input type="checkbox"/> Otherwise (to submit photocopy of passport including pages with immigration stamps or similar travel documents)</p>	<p>Singapore</p> <p>Offshore</p>
<p>¹ To include the duration of one or more short visits back to Singapore during the period</p> <p>² Please underline whichever is appropriate</p> <p>³ Where an individual is present in Singapore for any part of a day, his presence on that day shall be counted as one day</p>	
Part 4 Declaration	
<ul style="list-style-type: none"> I have personally presented and explained the questions in the proposal form to the policyowner/life insured. I have verified the personal particulars in the proposal form with the original NRIC/passport. I have performed reasonable checks to ensure that the policy is suitable for the client taking account of the client's objectives, financial situation and any particular needs. <p>I declare that all the answers given to me by the policyowner/life insured are declared in the proposal form. I have not withheld any other information that may influence the acceptance of the proposal by the company.</p> <p>_____</p> <p>Insurance adviser's signature _____ Date</p>	