

Personal Financial Questionnaire – Confidential

To be completed in English by the life assured.

Full name Date of birth (dd/mm/yyyy) Occupation Currency of information provided on this form (in words)

1. Please state your annual income for each of the last three years

Source	This year	Last year	Previous year
From own trade			
From investments			
From other sources			

2. Are any concurrent applications being made to other offices?

Yes ☐ No ☐ If Yes, please state name of company, sum insured and reason below.

3. Please detail any existing cover you may have:

	Date commenced	Sum insured	Reason for cover
Life Assurance			
Permanent Health Insurance			
Critical Illness Cover			
Other (please specify)			

4. Please detail your liabilities (e.g. mortgage and loans)

5. Please give details of dependants (number, age and relationship)

6. Have you ever been declared bankrupt?

Yes ☐ No ☐ If Yes, please give details and dates below.

7. Why is the cover required?

8. Please give details of personal assets (excluding life assurance)	Fixed Property	<input type="text"/>
	Investments	<input type="text"/>
	Other assets	<input type="text"/>
	Total assets	<input type="text"/>
	Total liabilities	<input type="text"/>
	Total estimated net worth	<input type="text"/>
	Estimated IHT Liability	<input type="text"/>

9. Please give details of any gifts being made or made within the last three years	<input type="text"/>
	<input type="text"/>
	<input type="text"/>

Data Protection Act

Any data you provide to RL360° may be shared, if allowed by law, with other companies both inside and outside of RL360° and to persons who act on your behalf. Data and information about you can be transferred outside of the Isle of Man and RL360° may be required to provide it to its regulator, its government or anyone else required by law.

RL360° will use your data and information to allow for the administration of your policy, prevent crime, prosecute criminals and for market research and statistics. RL360° will, at all times, make sure that your data and information is only used in ways that are allowed by law.

The Isle of Man Data Protection Act 2002 allows you, after paying a small fee, to receive a copy of the data and information RL360° holds about you.

For further information please write to: Data Protection Officer, RL360°, RL360 House, Cooil Road, Douglas, Isle of Man, IM2 2SP, British Isles.

Declaration

I declare that the above statements are true and correct and form part of my proposal for insurance.

I understand that failure to give true and complete answers to all questions may entitle the company to reject a claim made under the policy.

Signature of life assured	<input type="text"/>	Date (dd/mm/yyyy)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Where it has been requested that this form be witnessed by a third party (e.g. solicitor, bank manager, accountant), they must do so below. Please include the name of company and the company stamp.

Signature of third party	<input type="text"/>	Date (dd/mm/yyyy)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Name of third party	<input type="text"/>
Occupation	<input type="text"/>
Qualifications	<input type="text"/>
Address	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
Telephone number	<input type="text"/>
Email address	<input type="text"/>