भारतीय जीवन बीमा निगम LIFE INSURANCE CORPORATION OF INDIA

LIFE INSURANCE COPORATION OF INDIA

(Established by the Life Insurance Corporation Act 1956)

FORM FOR SUITABILITY ANALYSIS **CHENNAI DIVISION - I**

Marital S	Status: Ma	rried,	Single	, Widow_	, D	ivorced	·		
Occupat	tion: (Tick	appropriate b	ox)						
Busines	ss	Govt Service	е	Pvt. Service		Agriculture	Carolin	Housewife	
Studen	t	Professiona	ı	NRI		HUF		Others	
If Others	Please Si	pecify						The State of	
		s yearly incor							
	Employme		ne irom:	Rs		per	annum		
(ii)	Business o	or profession		Rs		per	annum		
(iii)	Other sour	ces (to be spe	ecified)	Rs		per	annum		
(iv)	HUFifany	,		Rs		per	annum		
(v)	Income of	the life to be as	ssured if ass	sured is differe	ent from the	e proposer.			
				Rs		pera	annum		
7 (5)		e proof submi							
(i)	Nature of d	locument rela	ting to incor	ne verification	: (Tick app	oropriate bo	x)		
	IT Return	1	Salary Ce	ertificate	CAC	Certificate		P&L Account	
	Property	Certificate iss	sued by Go	vt. Authority				Others	
(ii)	Is he/she a	n Income Tax	Assessee (Y	'ES/NO), if Ye	S				
				Tax Decales	0/				
	PAN:			Tax Bracket:	/0				

Policy No	Table/ Term	Year of Issue	Self/ dependent	Company / BO/ Division	Sum Assured	Term Rider SA	Critical Illness Rider	AB Rider	Annualised Premium
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							, 11		
							-		
		TOTAL							

(In case NOPs are more use separate sheet as Annexure to this form)

1 -		48001 - 0 -	LIVING	April 1991	The Latest	DEA	D	
R	Relationship	Age (Yrs)	State of I	health	Age at dea	th (Yrs)	Cause of de	eath
	Father	190 (110)	2.0.00		9-21-200			-constant (
	Mother							
	Brother			1434			2	
	Sister							
W	ife/Husband						8	
-	Son			1000	Sur			
	Daughter							
								-
	Spouse Detail	s:						
Na	ame		Occup	oation	GI T	Annual Inc	come	
Αç	ge Group		Avg Annual			7		
Ε.					arance triat carri	oe granted a	s per existing rul	010.
			Avg Alliluai	IIICOIIIC				
1.14	n to OF Moore	25 times						
	o to 35 years	25 times			Maximum Al	lowable In	surance:	
36	6 to 45 years	20 times	g mar colon	e mmo e te	Maximum Al	lowable In	surance:	
36 46	6 to 45 years 6 to 55 years	20 times 15 times	n, anti escul to	communication in the second	Maximum Al	lowable In	surance:	
36 46	6 to 45 years	20 times 15 times		SAME TO	Maximum Al	lowable In	surance:	
36 46 56	6 to 45 years 6 to 55 years 6 years and abo Object of Ins	20 times 15 times ve 10 times urance: (Tick	appropria	ite box/es)	147,366)		12
36 46 56	6 to 45 years 6 to 55 years 6 years and abo	20 times 15 times ve 10 times urance: (Tick	appropria	ite box/es) Risk Cove	erage with s	savings	
36 46 56	6 to 45 years 6 to 55 years 7 years and abo 7 Object of Ins Pure Risk C	20 times 15 times ve 10 times urance: (Tick		ite box/es) Risk Cove	erage with s		
36 46 56	6 to 45 years 6 to 55 years 6 years and abo Object of Ins Pure Risk C Money back	20 times 15 times ve 10 times urance: (Tick	ver) Risk Cove	erage with s	savings	
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36 46 56	6 to 45 years 6 to 55 years 6 years and abo Object of Ins Pure Risk C Money back Market linke	20 times 15 times ve 10 times urance: (Tick over with Risk Co	ver		Risk Cove Secured F	erage with s Return with Annuity	savings	
36 46 56	S to 45 years S to 55 years S years and abo Object of Ins Pure Risk C Money back Market linke Health Cove	20 times 15 times ve 10 times urance: (Tick over with Risk Co	ver		Risk Cove Secured F	erage with s Return with Annuity	savings	
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366 466 566 a.)	S to 45 years S to 55 years S years and abo Object of Ins Pure Risk C Money back Market linke Health Cove Others Risk Profile:	20 times 15 times ve 10 times urance: (Tick over with Risk Co d Return with	ver Risk cover	r Aggress	Risk Cove Secured F Pension/ Suitable fo	erage with s Return with Annuity	savings	
366 466 566 a.)	Object of Ins Pure Risk C Money back Market linke Health Cove Others Risk Profile: Conservativ	20 times 15 times ve 10 times urance: (Tick over with Risk Co d Return with er e to Moderate	ver Risk cover	Aggress	Risk Cove Secured F Pension/ Suitable fo	erage with s Return with Annuity or children	savings	
366 466 566 a.)	S to 45 years S to 55 years S years and abo Object of Ins Pure Risk C Money back Market linke Health Cove Others Risk Profile: Conservativ How would you	20 times 15 times ve 10 times urance: (Tick over with Risk Co d Return with er e to Moderate u like to pay yo	ver Risk cover	Aggress	Risk Cove Secured F Pension/ Suitable fo	erage with s Return with Annuity or children	savings Risk Cover	
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8. Categorization of Plans in relation to object of Insurance:

Pure Risk Cover	Risk Coverage with savings	Money back with Risk Cover	Secured Return with Risk Cover
	Conservative to Moderate	Conservative to Moderate	Conservative to Moderate
Tech Term	New Endowment Plan	New Bima Bachat	New Bima Bachat
Jeevan Amar	New Jeevan Anand	New Money Back - 20 yrs	Jeevan Shiromani
New Jeevan Mangal	New Bima Bachat	New Money Back - 25 yrs	Bima Shree
Bhagya Lakshmi	Single Premium Endowment Plan	New Children's Money Back Plan	
	New Money Back-20 yrs	Jeevan Tarun	
111 501 14	New Money Back-25 yrs	Jeevan Umang	
	Jeevan Lakshya	Bima Shree	
	Jeevan Labh		
	Aadhaar Stambh		
	Aadhaar Shila		
	Jeevan Umang		
- Amoreania Bloo	Jeevan Shiromani	to a land to the second of	
La September 19	Bima Shree	ewier er en en en en	
The particular	Micro Bachat		The state of the s

Pension / Annuity	Health Cover	Suitable for children
Conservative to Moderate	Conservative to Moderate	Conservative to Moderate
Jeevan Shanti	Jeevan Arogya	New Children's Money Back Plan
Jeevan Nidhi	Cancer Cover	Jeevan Tarun
2-10-11		New Endowment Plan
		New Bima Bachat
		Single Premium Endowment Plan
		New Money Back - 20 yrs
		New Money Back - 25 yrs
		Jeevan Labh
TOWARD II A		Aadhaar Stambh
		Aadhaar Shila
		Jeevan Umang
		Bima Shree
	Conservative to Moderate Jeevan Shanti Jeevan Nidhi	Conservative to Moderate Jeevan Shanti Jeevan Nidhi Cancer Cover

9. Product Chosen:

Table No	Plan Name	Term	
Sum Assured	Mode	Premium	

	2nd Year	note I de	lar haker	3rd Year on	wards
- Aller State of the State of t	182000		The state		76/2
o. Other charges which will b	e levied by cand	elling UNITs;			
Life Cover Charges %	Policy Adm	ninistration ch	arges	Fund Mana	agement Charges
The second second		E const	tura III.		
If Annuity/Pension is opt	ed;				
Target Annuity per Annum	Target A	nnuity per An	num		
	Immedia	ate Annuity		Amount	
		FIRE TOY			
	Deferred	Annuity:	Deferr	nent Period	Amount
total insurance added to the p	resent proposal	reasonable in	relation t	o income?	
#0					
l,	and the same of th	The state of the s			
have explained the basis fo		The second secon			vith respect to the
plan, premiums and charge policy fully to the prospect/p					product before
policy fully to the prospect/ p	olicyriolder.			iy preierred piar	n details are as fol
		THE		1202	100000
		Table No)	Plan Name	Term
	No prince		Nugera		
	100 100	Sum Ass	Nugera	Plan Name Mode	Term Premium
	100 mm		Nugera		
Place:	100 mm		Nugera		
Place: Date:	300 mm	Sum Ass	Nugera		
Date :	Intermediary	Sum Ass	Nugera	Mode	Premium
	Intermediary	Sum Ass	Nugera	Mode	
Date : Signature of Agent /		Sum Ass Place: Date:	sured	Mode	Premium
Signature of Agent / ne questions above pertain to e features of the product for y	your personal o	Sum Ass Place: Date:	sured e time of	Mode Sig	Premium gnature of Prospe
Signature of Agent / ne questions above pertain to e features of the product for a d will remain confidential.	your personal c	Sum Ass Place: Date: condition at the oplying. This is	e time of	Mode Sig	Premium gnature of Prospe I to your understa
Signature of Agent / ne questions above pertain to e features of the product for vide will remain confidential. If you do not wish to fill up	your personal o	Place: Date: condition at the oplying. This is maire, please	e time of nformation	Mode Sig	Premium gnature of Prospe I to your understa
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