

**SPECIAL MHR FOR MAIL ORDER BUSINESS**

Agent's Name & Address	D.O./CLIA Code No./Mentor code no
Mobile number	D.O./CLIA/Mentor Mobile no-
Agency code	
Club membership	
Licence No.                                  Date of Expiry	

<b>Name of the Proposer/ Life to be assured :</b>	
<b>Age of the proposer/ Life to be assured:</b>	
<b>Plan(s) and Term</b>	<b>Sum Assured ( in lakhs)</b>

<b>I</b>	<b>Product related information</b>
	a. Name of the Proposer / Life to be assured
	b. Age of the Proposer / Life to be assured:
	c. Plan(s) and Term
	d. Sum Assured ( in lakhs)
	e. Whether the terms and conditions of the proposed plan(s) have been explained to the proposer / Life to be assured?
	f. Whether the proposed plan(s) matches the objectives of insurance of the proposer / Life to be assured?
	g. Have you provided the Benefit Illustration statement of the proposed plan(s) to the proposer / Life to be assured?

<b>II</b>	<b>Information about the proposer / Life to be assured</b>
	a. How long do you know the proposer/ Life to be assured?
	b. Are you related to him/her? If so, give details
	c. What is the educational qualifications of the proposer/ Life to be assured ?
	d. If student, Date of joining College/ University
	e. If proposer/ Life to be assured is OCI, whether OCI (Overseas Citizen of India) card is verified?
	f. Whether proposer/ Life to be assured or his / her family member/s is/are Politically Exposed Person (PEP) as per RBI guidelines? [As per RBI guidelines PEPs are the individuals who are or have been entrusted with prominent public functions in a foreign country.]
	g. Are you satisfied that the proposer/ Life to be assured is not connected with any terrorist activities ?
	h. Whether KYC/ PMLA norms are fulfilled for the proposer/ Life to be assured ?

<b>III</b>	<b>Financial assessment by the Agent</b>
	a. Exact Source of Income
	b. Income through employment/ Business/ Profession
	c. Income through other sources in detail
	d. Mention the proof of income verified by you in respect of income stated above
	1. ITRs
	2. Bank statement,
	3. Salary sheet with appointment letter or salary certificate issued by the Employer
	4. CA certificate/ Audited accounts etc.

