

Name:	DOB:
Address:	Postcode:

Question	Notes
Are you married/single/living with a partner	
Who would you like insurance for? single or joint policy	
Your occupation	
Full-time/part-time/ employed/ self employed	
Your annual salary?	
Your disposable income	
Your monthly budget/maximum affordability	
Any children? if so, what age?	
Mortgage or renting?	
Any loans or debts?	
Any savings for unforeseen circumstances?	



Question	Notes
Do you have a will?	
Are there any future changes? moving house, planning on having a baby, etc.	
Do you have sick pay with work?	
Do you have death in service with your job?	
Are you a UK resident?	
Why would you like life insurance?	

Notes:			