

## Self Employed / Unearned Income Declaration

(applicable for male and female lives)

Proposal Number : \_\_\_\_\_ Date of Birth \_\_\_\_\_

Life to be Insured Name : \_\_\_\_\_

Marital Status :  Single  Married  Divorced  Widow

Educational Qualification : \_\_\_\_\_

Are You an Income Tax Assessee?  Yes  No (Documentary Evidence- ITRs)

**Husband's Details (In case of married females only)**

Annual Income : Rs. \_\_\_\_\_

Existing Insurance Cover Inforce: Rs. \_\_\_\_\_

**Parents' Details (In case of unmarried/Divorced/Widow (er) only)**

Annual Income: Rs. \_\_\_\_\_

Existing Insurance Cover Inforce: Rs. \_\_\_\_\_

**Sources of Income along with details (Tick as applicable):**

**Unearned Income:**

**Rental Income- [Documentary evidence-ITRs/Rent/Lease Agreement/Rent Receipts(last 6 months), etc.]**

Number of properties yielding rental income: _____	
Duration of Lease: _____ years	Monthly Rental : Rs. _____

Period of Lease : From \_\_\_\_\_ (mm/dd/yy) to \_\_\_\_\_ (mm/dd/yy)

**Investment and Interest Income- [Documentary evidence – ITRs/Investment Proof-eg. Copy of FDs, Bonds, portfolio Statement etc.]**

Amount invested in Bonds/FDS/Bank Savings: Rs. \_\_\_\_\_ Rate of Interest(percent) \_\_\_\_\_

Period of investment: \_\_\_\_\_ years Annual Earning Rs \_\_\_\_\_

**Earned Income:**

**Tuition Income – [Documentary evidence- ITRs, Bank statement held in own name for last 1 year, etc]**

No. of Students per month: \_\_\_\_\_ No. of subjects taught \_\_\_\_\_ Fees per head Rs. \_\_\_\_\_

per month Fees per subject Rs. \_\_\_\_\_ per month; No. of Working hours per day: \_\_\_\_\_

Do you work from home? Yes/No

Is this your regular source of income?  Yes  No

**Income from Business (Beautician, Tailoring etc) : [Documentary evidence- ITRs, Bank statement held in own name for last 1 year, etc]**

Exact nature of business : \_\_\_\_\_

Number of Client per day : \_\_\_\_\_ Average Earning per day \_\_\_\_\_

Earning per month: Rs. \_\_\_\_\_

Is this your regular source of income?  Yes  No.

Is this a registered business/Franchisee?  Yes  No.

Do you maintain books of accounts in respect of your business?  Yes  No

Do you maintain books of accounts?  Yes  No.

**Income from agriculture: [Documentary evidence- ITRs, 1 year Bank statements( held in own name)/Patwari certificate/Form J/agricultural land holding documents]**

Type of crop cultivated : \_\_\_\_\_  
 Yield/acre/annum in Rs terms : \_\_\_\_\_  
 Area of land cultivated: \_\_\_\_\_  
 Is this your regular source of income?  Yes  No

**Enclosures :** Please tick the documentary evidence enclosed-

- Income Tax Returns
- Rent/Lease Agreement/Rent Receipts (last 6 months)
- Investment Proof – eg. Copy of FDs, Bonds, Portfolio statement
- Bank statement hold in own name for last one year
- Patwari certificate/Form J/agricultural land holding documents
- If others, please specify \_\_\_\_\_
- Not Available

I declare that answers I have given are, to the best of my knowledge, true and that I have not withheld any material information that may influence the assessment or acceptance of this application.

I agree that this form will constitute part of my proposal (dated \_\_\_\_\_) for life insurance and that failures to disclose any material fact known to me may invalidate the contract.

\_\_\_\_\_  
 Name & Signature of the Life Assured / Proposer  
 (To be completed by the Advisor) Date \_\_\_\_\_

I hereby declare that the foregoing statements are true and correct to the best of my knowledge of belief.

Advisor Name	Advisor Code	Date	Signature of Advisor

(To be completed by Unit Manager/Branch Manager or equivalent)

I am satisfied with the identity of the party and on the basis of my independent enquiries, I hereby declare that the foregoing statements are true and correct

Name	Designation	Date	Signature