

QUESTIONNAIRE



Contract Proposal No(s):

Name I am an ☐ Individual ☐ EntityI am an / a ☐ Assured ☐ Joint Assured ☐ Beneficial OwnerIdentification No. / Passport No. / Company Registration No.

Important Notes

- As part of enhanced customer due diligence measures, this Questionnaire has to be completed to your best knowledge and the information provided here will form part of your insurance or investment application. All terms and conditions apply.
- The purpose of this Questionnaire is to help Singapore Life Ltd. understand and establish your source of wealth – the origin of the entire body of wealth, that is, your total assets.
- Singapore Life Ltd. may ask for documentary evidence to support the information you provide in the Questionnaire. The documentary evidence may include, but is not limited to the following:

Source of Wealth	Examples of documentary evidence
Employment income / rental income	- latest Notice of Assessment - recent payslips - bank statements, showing receipt of employment income for recent months - copy of tenancy agreement - financial statements / audited accounts / certification. of incorporation / business profile information / annual reports, etc.
Saving / deposit	- bank reference letter - time / fixed deposit statements
Lottery / gaming	lottery slips together with copy of results of lottery win and/or copy of cheque drawn out by the "Singapore Pool"
Inheritance / gift	Will / trust deed / grant of probate / grant of administration
Compensation payment	Court Order or letter from solicitor / compensating party
Matured investment / policy claim	letter from insurance company
Sale of company	- signed letter from solicitor or regulated accountant - copies of media coverage (if applicable) as supporting evidence
Sales of shares / other investments	- bank statement showing receipt of funds by investment company name - investment account statements / proof of redemptions from investment companies
Sale of property	conveyancing document
Loan	loan agreements or loan statements

SECTION A: QUESTIONS

(a) What is your estimated net worth?

Earnings	Amount (SGD)	Assets	Amount (SGD)	Liabilities	Amount (SGD)
Annual income		Fixed asset(s) <i>eg. property</i>		Outstanding long term loan(s) <i>eg. mortgage loan</i>	
Annual business profits <i>Applicable for business owner</i>		Saving(s) / Deposit(s)		Outstanding short term loan(s) <i>eg. credit card bills, tax liability</i>	
		Investment(s) <i>eg. stocks and shares, bonds, debentures, managed investments</i>			
Others, please specify:		Others, please specify:		Others, please specify:	
Total (SGD):		Total (SGD):		Total (SGD):	

(b) How do you derive your source of wealth?

You may tick more than one selection(s)

- | | | |
|--|--|--|
| ☐ Employment income / rental income | ☐ Saving / deposit | ☐ Lottery / gaming |
| ☐ Inheritance or gift | ☐ Compensation payment | ☐ Matured investment / policy claim |
| ☐ Sale of company | ☐ Sales of shares / other investments | ☐ Sale of property |
| ☐ Loan | ☐ Others
Please state <input type="text"/> | |

(c) Please provide further details on the source of wealth answered in (b).

SECTION B: DECLARATION

Declaration by Assured

I declare that the information provided in this Questionnaire is true, correct and complete to the best of my knowledge. I undertake to provide Singapore Life Ltd. with any further information or documentary evidence it requires in respect of the information I have provided.

Name and Signature of Assured

Date (dd/mm/yyyy)