

SPECIAL FINANCIAL CCR

(To be filled by level 8 and above, source of information to be provided in required fields)

Proposal No: Advisor Code : Name of The Life Assured/Proposer Q1. Do you agree with the detailed ACR by advisor? Yes NoQ2. Are all the details provided are satisfactory of Life to be assured / Proposer? Yes No**A. Customer Profile Details**

Name of the customer	
Education	
Annual income	
Social media check detail	

B. Family Background, Income / Occupation Details

Family Member	Occupation	Designation/ Name of organization	Work experience	Approx Income (p.a.)	Source of information / Documents verified
Father					
Mother					
Spouse					
Children					

C. Business / Profession / Occupation of Life Assured / Proposer

Occupation	Name of the Organization	Designation	Approx Income (p.a.)	Source of information / Documents verified
Salaried				
Professional				
Self Employed				

D. Other Sources Of Income

Source of Income	# of Yrs of source	Approx Income (p.a.)	Source of information / Documents verified

E. Property Details

Property	Approx Area	Locality & Date of Purchase	Approx Mkt Value and Source of information
Flat / Bungalow			
Shop / Commercial			
Agricultural			
Land Land (non-agri.)			
Others:			

F. Asset Details

Car Model & Reg No. Other assets	Date of Purchase	Approx Mkt Value	Source of information/ Documents verified

G. Other Investment Details

Type of Investment	Market Value	Invested With	Source of information/ Documents verified
Mutual Funds			
PPF			
Insurance			
Fixed Deposits			
Others			

H. Average Bank Balance

Bank Details	Average Balance	Source of information/ Documents verified

I. Recommendation Basis Profile

I hereby declare that the foregoing statements are true and correct, this are made as a result of my detailed enquiries and on verification of documentary evidence.

Name: _____

Date: _____

Place: _____

Signature of the Level 8 and above