

## INSURANCE BROKERS ENDOWMENT MORTGAGE SUPPLEMENTARY QUESTIONNAIRE

Please read the following questions carefully and answer them all providing additional information where required. Should you require more space please provide answers on a separate sheet of paper.

Answer the question using **BLOCK CAPITALS** and tick boxes where appropriate.

Name of the Proposer(s)

Has the Proposer ever been involved in arranging (including giving advice) low cost or low start endowment policies in connection with mortgages?

YES

NO

If yes please advise the numbers for each of the years.

YEAR	No. OF CASES
1988	
1989	
1990	
1991	
1992	
1993	
1994	
1995	
1996	
1997	
1998	
1999	
2000	
2001	
2002	
2003	

If yes please advise the largest and average mortgage values in each of the years.

YEAR	LARGEST MORTGAGE VALUE	AVERAGE MORTGAGE VALUE
1988		
1989		
1990		
1991		
1992		
1993		
1994		
1995		
1996		
1997		
1998		
1999		
2000		
2001		
2002		
2003		

Referring back to the answers given above has it been the Proposer's practice to advise intending investors (and to document on file) that:

An endowment cannot be guaranteed to pay off any mortgage loan at maturity?

YES  NO

Other forms of mortgage repayment are available which could meet that clients needs?

YES  NO

That an endowment policy involves an investment risk?

YES  NO

If NO to any of the above please provide details.

## DECLARATION

I/we declare and warrant that after enquiry all statements and particulars contained in this Proposal and addenda are true and that no information whatsoever has been withheld which might increase the risk of the Underwriters or influence the acceptance of this Proposal and should the above particulars alter in any way I/We will advise Underwriters as soon as is practicable.

I/We understand that failure to disclose any material facts which would influence the acceptance and assessment of the Proposal may result in the Underwriters refusing to provide indemnity or voiding the possibility in every respect.

I/We hereby agree and accept that this Declaration shall be the basis of the contract between both parties if entered into.

SIGNATURE

POSITION

NAME

DATE