

1. Advisor information

Advisor name:		
Office:		
Province:	Email:	Phone number:

2. Client details

Type of insurance: <input type="checkbox"/> Individual <input type="checkbox"/> JLTD			Policy owner: <input type="checkbox"/> Individual <input type="checkbox"/> Corporate (Please provide corporation name below)		
Corporation name:					
Insured 1					
Name:	Age:	Date of birth:	<input type="checkbox"/> Smoker	<input type="checkbox"/> Non-smoker	
<div style="text-align: center;"> Y Y Y Y M M D D <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> </div>					
Insured 2 (if JLTD is selected)					
Name:	Age:	Date of birth:	<input type="checkbox"/> Smoker	<input type="checkbox"/> Non-smoker	
<div style="text-align: center;"> Y Y Y Y M M D D <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> </div>					

3. Tax details

Personal Tax Rate: % or <input type="checkbox"/> System default (Highest MTR)	Corporate Tax Rate: % or <input type="checkbox"/> System default (Highest MTR)
Dividend Tax Rate: % or <input type="checkbox"/> System default (Highest MTR)	

4. Loan details

Loan Advances: <input type="checkbox"/> Individual <input type="checkbox"/> Corporate		Loan Type: <input type="checkbox"/> 100% of Premium <input type="checkbox"/> CSV (Please provide details below)	
CSV %:	%	Number of Loans:	Loan Rate: %
		Guarantor Fee (if applicable):	
Refinancing interest: <input type="checkbox"/> Yes (If Yes until what age) <input type="checkbox"/> No		Until age:	
Collateral percentage (Default 90%):			
Interest deductibility: <input type="checkbox"/> Yes <input type="checkbox"/> No		NCPI deductibility: <input type="checkbox"/> Yes <input type="checkbox"/> No	

5. Insurance policy details

Product: <input type="checkbox"/> iA PAR <input type="checkbox"/> Equibuild <input type="checkbox"/> Genesis UL (Please provide interest rate below)	
Interest rate (for Genesis UL):	%
Dividend scale: <input type="checkbox"/> Current <input type="checkbox"/> -1% <input type="checkbox"/> -2%	

Note

In addition to the form above we would ask that you also provide us with an illustration.

Include IFA presentation with the quote in power point format

INVESTED IN YOU.