



DAWOOD FAMILY TAKAFUL LIMITED

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BM INSPECTION REPORT (Confidential)

PART 'A'

PROPOSAL NO. / CERTIFICATE NO.	DATE
PARTICIPANT'S NAME	BRANCH
NAME OF BRANCH MANAGER WHO VISITED THE PARTICIPANT.	

GENERAL INFORMATION

Do you know the life proposed personally? If yes since how long? _____ Relationship (if any) _____
If no, how was the meeting arranged? _____
Place of meeting _____ Date of meeting _____
Name of the other sales person accompanied (if any) _____

HEALTH & PHYSICAL STATUS OF THE PARTICIPANT:-

From his general appearance and looks do you feel, he is a healthy individual? _____
If not, give details _____
What is the age by appearance according to your judgement? _____
Are his habits sober & temperate? _____
Was he co-operative in giving the information required by you? _____

FINANCIAL STATUS OF THE PARTICIPANT:-

What is the exact nature of his occupation and source of the earned income? _____
What is his approximate monthly earned income? _____
How was his business place? _____
What is the basis for your information about his income? _____

RECOMMENDATIONS / REMARKS ABOUT THE PARTICIPANT:-

In your opinion, his income is sufficient for the proposed Sum cover _____
Are you fully satisfied about need of this risk? If not give details _____
Can you certify that medical examination and other clinical tests furnished to DFTL are of the life proposed and have been conducted by DFTL examiners? _____
In your opinion, is there any involvement of Moral Hazard. If so give details, _____
Give details of life Insurance / family Takaful on his own life or on the lives of other members of the family. If any _____
Any other information _____

Do you recommend for acceptance of this proposal for the amount as applied for or do you suggest any amendments _____

Signature _____

Date:- _____

Note:- Below given portion to be filled by the client.

I do hereby certify that to the best of my knowledge and belief, above information is correct.

Place of meeting _____ Date of meeting _____

Signature of Participant _____

(If female life go to part B)