

Global Term

Personal financial statement

WARNING: PURSUANT TO SECTION 25(5) OF THE INSURANCE ACT OF SINGAPORE (CAP.142), YOU ARE TO DISCLOSE IN THIS APPLICATION FORM, FULLY AND FAITHFULLY, ALL THE FACTS WHICH YOU KNOW OR OUGHT TO KNOW, OTHERWISE THE POLICY ISSUED HEREUNDER, MAY BE VOID.

Your financial planner will help you to assess whether you are required to complete this personal financial statement based on our financial underwriting guidelines. If required, your financial planner will help you to complete this form. If both of the lives assured are required to complete a personal financial statement, please complete this form separately.

Details of life assured

Name			
Date of birth (DD/MM/YYYY)			
Unique identification number (NRIC or passport)			

Income information

Please state your earned income and the currency in last three years.

	Year		Year		Year	
	Currency	Amount	Currency	Amount	Currency	Amount
Salary/Wages						
Bonus/Dividends						
Other (please specify)						

Please state your unearned income and the currency in last three years.

	Year		Year		Year	
	Currency	Amount	Currency	Amount	Currency	Amount
Real estate income						
Investment: dividends, bonds, interest etc						
Other business income						
Other (please specify)						
Total annual income						

Net worth

Assets

	Currency	Amount
Cash and savings	<input type="text"/>	<input type="text"/>
Shares/Bonds	<input type="text"/>	<input type="text"/>
Real estate	<input type="text"/>	<input type="text"/>
Personal property (main residence)	<input type="text"/>	<input type="text"/>
Business shareholding	<input type="text"/>	<input type="text"/>
Other (please specify) <input type="text"/>	<input type="text"/>	<input type="text"/>
Total net worth	<input type="text"/>	<input type="text"/>

Liabilities

	Currency	Amount
Personal loans	<input type="text"/>	<input type="text"/>
Investment property mortgage(s)	<input type="text"/>	<input type="text"/>
Residential mortgage(s)	<input type="text"/>	<input type="text"/>
Business loans/security	<input type="text"/>	<input type="text"/>
Other (please specify) <input type="text"/>	<input type="text"/>	<input type="text"/>

Real estate

Please list all real estate in which you have all/part ownership, please specify the percentage owned and the currency.

Address	Date of purchase (DD/MM/YYYY)	Country of purchase	Percentage owned	Purchase price	Mortgage	Current value

Declaration

I am not aware of any factors which may result in a significant deterioration in my financial position as disclosed on this form.

I agree to inform Friends Provident International in writing of any material change in my financial position between the signature date of this document and the issue of the policy document.

I declare that all of the information in this form is true and complete to the best of my knowledge and that I have not withheld any material information which may influence the assessment or acceptance of this application. I agree that this form will form part of my application and will be relied upon by Friends Provident International in assessing my application.

I acknowledge and consent that, if the information provided in this form is subsequently found to be false, misleading or exaggerated, this may entitle Friends Provident International to void the policy.

I understand, at the time of a claim, Friends Provident International may require documentary evidence of my financial position in order to substantiate the information on this form.

In the case of a claim, I hereby authorise the executor or administrator of my estate to provide Friends Provident International with any documentary evidence of my financial position as required by Friends Provident International in order to substantiate the claim.

If a material fact is not disclosed in this application, any policy issued may not be valid. If you are in doubt as to whether a fact is material, you are advised to disclose it. This includes any information that you may have provided to the financial planner but which was not included in the application. Please check to ensure that you are fully satisfied with the information declared in this application.

Signature

Date (DD/MM/YYYY)

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Data privacy

We take the responsibility of handling your personal data very seriously and we will only ask you for details required to process your requests to us. Please be aware of our privacy policy - please visit www.fpinternational.sg/legal/privacy-and-cookies.jsp to view the full policy or this can be provided on request from our Data Protection Officer.

Friends Provident International Limited: Registered and Head Office: Royal Court, Castletown, Isle of Man, British Isles, IM9 1RA. Telephone: +44 (0)1624 821212 | Fax: +44 (0)1624 824405 | Website: www.fpinternational.com. Isle of Man incorporated company number 11494C. Authorised and regulated by the Isle of Man Financial Services Authority. Provider of life assurance and investment products. Authorised by the Prudential Regulation Authority. Subject to regulation by the Financial Conduct Authority and limited regulation by the Prudential Regulation Authority. Details about the extent of our regulation by the Prudential Regulation Authority are available from us on request. **Singapore branch:** 4 Shenton Way, #11-04/06 SGX Centre 2, Singapore 068807. Telephone: +65 6320 1088 | Fax: +65 6327 4020 | Website: www.fpinternational.sg. Registered in Singapore No. T06FC6835J. Licensed by the Monetary Authority of Singapore to conduct life insurance business in Singapore. Member of the Life Insurance Association of Singapore. Member of the Singapore Financial Dispute Resolution Scheme. Friends Provident International is a registered trademark and trading name of Friends Provident International Limited.