

PROPOSAL SUBMISSION CHECKLIST

(for policy to be owned by an individual)

Submitted by: _____

Rep Code: _____

Name of Proposer: _____

Date: _____

Please ensure that the following are attached and are **CLEAR AND LEGIBLE**:

Items	Requirements	For CLIS's Use
Proposal Form	Currency Type: <input type="checkbox"/> SGD <input type="checkbox"/> RMB <input type="checkbox"/> Others: _____ <input type="checkbox"/> Signed and dated by Proposer & Life to be Insured (if different from Proposer) <input type="checkbox"/> Witnessed and dated by Representative <input type="checkbox"/> Signed and dated by Representative <input type="checkbox"/> All questions must be completed/answered	<input type="checkbox"/> In order <input type="checkbox"/> Not in order
Benefit Illustration & Product Summary	<input type="checkbox"/> Signed and dated by both Representative & Proposer (Dated as Proposal Date or earlier)	<input type="checkbox"/> In order <input type="checkbox"/> Not in order
Fact Find & Recommendation	<input type="checkbox"/> Signed and dated by Proposer <input type="checkbox"/> Signed and dated by Representative <input type="checkbox"/> Endorsed and dated by Representative's Manager OR <input type="checkbox"/> Declaration of Accredited Investor Status – Signed and dated by both Proposer & Representative	<input type="checkbox"/> In order <input type="checkbox"/> Not in order
<u>Identification Documents of Proposer & Life to be Insured</u> Singapore Citizens & SPRs Foreign lives who are Singapore residents Foreign lives who are NOT Singapore residents For all Juvenile lives	Please tick the appropriate box: <input type="checkbox"/> Copy of NRIC - Verified and dated by Representative <input type="checkbox"/> Copy of Employment/ Work/ Dependant's/ Student's/ Long-term Pass + Passport + Proof of address ¹ – Verified and dated by Representative <input type="checkbox"/> Copy of Passport + Proof of address ¹ – Verified and dated by Representative <input type="checkbox"/> Copy of Birth Certificate – Verified and dated by Representative	<input type="checkbox"/> In order <input type="checkbox"/> Not in order
<u>Additional Document for Singapore Citizens, SPR and Pass Holders who have NOT been residing in Singapore</u> Singapore citizens who have resided outside Singapore continuously for 5 years or more <u>and</u> not currently residing in Singapore SPRs and Work Pass Holders who have resided in Singapore for less than 183 days in the last 12 months Long-term Pass Holders who have resided in Singapore for less than 90 days in the last 12 months	Answer to Residency Question = "Yes", please obtain additional documentary proof and tick the appropriate box: <input type="checkbox"/> Copy of Work/ Student/ Other permit issued by foreign authority evidencing non-residency - Verified and dated by Representative <input type="checkbox"/> Copy of the relevant pages of SPR or Pass Holder's passport evidencing non-residency - Verified and dated by Representative <input type="checkbox"/> Copy of the relevant pages of Pass Holder's passport evidencing non-residency - Verified and dated by Representative	<input type="checkbox"/> In order <input type="checkbox"/> Not in order <input type="checkbox"/> N.A.

¹ Proof of address means recent (i.e. dated not more than 3 months before Proposal Date) copy of utility or telephone bill, statement from a Singapore bank or correspondence from a government agency. This is required if the residential address is not found on the foreign identification document.

Items	Requirements	For CLIS's Use
Documents for Third Party Payment	<input type="checkbox"/> Copy of NRIC or Passport of Payor - Verified and dated by Representative	<input type="checkbox"/> In order <input type="checkbox"/> Not in order <input type="checkbox"/> N.A.
First/ Initial Payment	Refer to Premium Payment Methods for payment details <input type="checkbox"/> Cheque <input type="checkbox"/> Credit Card <input type="checkbox"/> Fund/Telegraphic Transfer (with validated bank paying-in slip)	<input type="checkbox"/> In order <input type="checkbox"/> Not in order <input type="checkbox"/> No payment
Advance Premium Payment (APP)	<input type="checkbox"/> Yes - Please submit completed and signed APP form. <input type="checkbox"/> No	<input type="checkbox"/> In order <input type="checkbox"/> Not in order <input type="checkbox"/> N.A.
<u>FATCA</u> Non-US person with US indicia US person	Where applicable: <input type="checkbox"/> Form W-8BEN – Signed and dated by Proposer <input type="checkbox"/> For those with US place of birth: Copy of Certificate of Loss of Nationality of the US – Verified and dated by Representative <input type="checkbox"/> Form W-9 – Signed and dated by Proposer	<input type="checkbox"/> In order <input type="checkbox"/> Not in order <input type="checkbox"/> N.A.
<u>Common Reporting Standard (CRS)</u>	Proposer's Residential Address country \neq tax residence country, please obtain: <input type="checkbox"/> Supplementary Proposal Form detailing reason – Signed and dated by Proposer <input type="checkbox"/> Documentary evidence, e.g. student visa, diplomatic passport - Verified and dated by Representative	<input type="checkbox"/> In order <input type="checkbox"/> Not in order <input type="checkbox"/> N.A.
<u>Important</u> - <u>One</u> checklist is required for <u>One</u> application. - All amendments have to be counter-signed by the Proposer.		Checked by:
		Name
		Date