

1. I understand you recently took out a policy with ( fidelity, partners, aia) from one of our advisers Is that correct?

- Yes

2. Was the adviser by him / herself?

- No

3. How would you describe the adviser's standard of service on a scale of 1-10? (10 is the highest)

- 9

4. As you are aware, non disclosure can lead to non payment of claim. To make sure the correct underwriting takes place , we have noted your current pre-existing medical conditions are \_\_\_\_ and \_\_\_\_\_. Is there anything else apart from this not stated?

- Not sure

5. We have received authority for all future payments to be direct debited from your bank account? Is this correct?

- Yes

6. Did you take this policy to replace any other policy?

- Yes

7. We have your occupation recorded as \_\_\_\_\_ - is that correct?

- Yes

8. What is your understanding of the benefits of the policy?

N/A



Date:4th March 2022 Lead Source: Self-generated

Adviser: Idell Cummerata

Policy Holder: testing

Caller Name:Admin Account

Caller Email Address: admin@mail.com

- Yes

10. Do you have any further comments?

- Yes

11. If replacement( were the risks of replacing this insurance policy explained to you?

- N/a

12. Remedial Action Taken Or Proposed:

- Yes

Notes:

9. It speci in the autho to proce that a copy of the discl state was given to you and your insur plan and or plan/ of your LAT was e maile to e mail addre John . Did you recei them



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- Test