

<b>Date: 4th March 2022</b>	<b>Lead Source: Self-generated</b>
<b>Adviser: Idell Cummerata</b>	<b>Policy Holder: testing</b>
<b>Caller Name: Admin Account</b>	<b>Caller Email Address: admin@mail.com</b>

**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**

**9. It specified in the authority to proceed that a copy of the disclosure statement was given to you and your insurance planner and or plan/copy of your LAT was e mailed to e mail address John@eliteinsure.co.nz . Did you received them?**

**- 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:**

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- Yes

Notes:

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