



Pre-Sale Questionnaire - Overseas residents

For confirmation of cover available, underwriting requirements or if there will be a territorial loading before submitting an application, please complete this questionnaire fully and send it to your Account Manager, or to sales@aiglife.co.uk.

We will then liaise with the relevant reinsurer(s) to obtain confirmation. Please be aware that in some cases this may take up to one week.

Life/lives assured

	Life Assured 1	Life Assured 2
Title		
First name		
Last name		
Date of Birth		
Country and city of residence		
How long resident there?		
How many months per year resident there?		
How long intended to stay there?		
Basis of residency (e.g. citizen of that country, permanent right to reside, temporary visa)		
Nationality (If dual nationality please provide full details including the countries and the basis of citizenship)		
Details of any other countries you will work, live or travel to (Please include frequency and duration, location and purpose of trips)		
Details of any other countries you have worked, lived in or travelled to in the last 5 years (other than holidays lasting less than 3 months)		

Proposed cover

Please note: no disability benefits (e.g. Waiver of Premium, TPD or Income Protection) will be available.

Product(s)	
Sum assured(s)	
Term(s) (unless Whole of Life)	
Single / Joint-Lives	
Level / Increasing / Decreasing	
Reason(s) for cover (e.g. UK mortgage / IHT / family protection / business protection)	

For UK mortgage cover

Amount of mortgage	
Term of mortgage	
Purpose of mortgage (e.g. residence, buy to let, 'consent to let' mortgage on residence)	

For UK family protection

Please advise why UK family protection is needed	
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For UK business protection

Reason(s) for cover (e.g. Key person, Shareholder Protection)	
Name of company	
Location of company	
Why is UK cover needed?	

For UK IHT cover

	Life Assured 1	Life Assured 2
Country of domicile (as defined by the HMRC)		
Net value and breakdown of <u>UK assets held in own name</u>		
Net value of <u>UK residential property</u> held in an <u>offshore 'envelope'</u> (trust / company / partnership)		
Amount of IHT liability		
Any other relevant information to justify requested level of cover		

Please note: we will need independent evidence of the UK IHT liability.

Other cover reasons

<p>Please provide full details of the cover, including the UK liability being covered, why UK cover is being requested and why the sum assured and term have been selected</p>	
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Life of Another applications

Please note: you can ignore this section if the policy is to be owned by the life / lives assured.

Who will own the policy?	Individual	Company	Existing Trust
Name of policy owner			
Relationship to the assured(s)			
How will the policy owner suffer a financial loss upon death of the assured(s)?			
If ' <u>Existing Trust</u> ' - are the beneficiaries the same as those of the assured's estate?			
Who will pay the premiums? *	Life / Lives Assured	Policy Owner	

* Premiums must be paid in GBP from a bank account in the UK, Jersey, Guernsey, Isle of Man or Gibraltar.

Further information

Please provide any other relevant information:



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