PERSONAL RISK INSURANCE – ARE YOU ADEQUATELY INSURED?

Client Name

Personal Lending Manager

1. Do you have sufficient life insurance to cover, as a minimum your existing and proposed debts?
   Yes ☐ No ☐ Unsure ☐

2. Do you consider this is the minimum amount of cover you need?
   Yes ☐ No ☐ Unsure ☐

3. Do you have income protection insurance?
   Yes ☐ No ☐ Unsure ☐

4. If you are self employed, do you have the appropriate insurance cover to protect your business assets and income streams?
   Yes ☐ No ☐ Unsure ☐

5. Have you reviewed your personal insurance requirements within the last 12 months?
   Yes ☐ No ☐ Unsure ☐

IMPORTANT: It is strongly recommended that if you are reviewing your lending requirements you should in turn review your insurance needs.

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