



If applying for personal insurance, please skip questions 5 - 12 and complete the Signature and Agreement section at the bottom of this page. If applying for business insurance, please complete questions 5 - 12 and the Signature and Agreement section on this page.

5. Purpose of business insurance

- Key Person   
  Deferred Compensation   
  Buy-Sell/Cross Purchase Agreement   
  Stock Repurchase   
  Creditor  
 Other (explain): \_\_\_\_\_

6. Is a written buy/sell agreement in effect? (if yes, attach copy).....  yes  no  
 Is a buy/sell agreement contemplated? .....  yes  no

7. Creditor: Name of lender \_\_\_\_\_  
 Is insurance requested by lender? .....  yes  no  
 Coverage amount required by creditor: \$ \_\_\_\_\_  
 Purpose of loan: \_\_\_\_\_

(Use "Remarks" below for further details.)

8. Are other key persons or partners being insured? .....  yes  no  
 If yes, provide amount of inforce and/or applied for coverage with us or another insurance company. If no, explain:  
 \_\_\_\_\_

9. What percentage of the business do you own? \_\_\_\_\_%

10. Date business started? \_\_\_\_\_

11. Estimated fair market value of business: \_\_\_\_\_ (In "Remarks" state how this value was determined)

12. Financial details of business:

	Current fiscal year (Date / / thru / / )	Previous fiscal year
A. Total assets		
B. Total liabilities		
C. Gross sales or revenue		
D. Net income (before taxes)		

Please submit a copy of the most recent balance sheet and income statement (year or quarter).

Remarks (questions 5 - 12)  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**Agreement:** I hereby declare that all statements and answers to the above questions are complete and true to the best of my knowledge and belief. I agree that they and this questionnaire shall form a part of my application for insurance. I agree that my failure to disclose any material fact known to me may invalidate the contract. The Company will rely on my answers to determine the appropriate amount of insurance.

**Owner Signature**

**Proposed Insured (PI) Signature**

X \_\_\_\_\_

X \_\_\_\_\_

Owner signed on (date) \_\_\_\_\_

PI signed on (date) \_\_\_\_\_

Owner signed at (city, state) \_\_\_\_\_

(If under age 16, signature of parent or guardian)

