

NM INVESTMENT - Insurance Checklist

Applicant Name :

Documents required

Pan Card

Aadhar Card

Photo

Cheque/Net banking

Note :

Income proof

ITR Ack & Computation (3 years)

Salary Certificate (3 years)

Age (years)	Income multiple
18 - 35	25
36 - 45	20
46 - 50	15
51 - 60	10

Personal Details

Education Qualification :

Occupation :

Marital Status :

Spouse Name (If married) :

Email Id :

Mobile No. :

Nominee Details

Name : Birthdate :

Health Details

Height :

Weight :

Do you consume Tobacco/Alcohol/Drugs? :

Do you have Blood Pressure / Diabetes / Heart problem/ any other ?

Any Surgery/Operations done in past :

Family History

Father : Age : Died/Alive : Reason :

Mother : Age : Died/Alive : Reason :

Brother : Age : Died/Alive : Reason :

Sister : Age : Died/Alive : Reason :

Existing Insurance

Company : Sum Assured :

Company : Sum Assured :

Policy Details : For office Use

Company : Sum Assured : Rider :

Policy Term : PPT : Pay-out Option :