



ASU Insurance – Information Capture Sheet

When completing the Information Capture Sheet, or having your Insurance Advisor complete it on your behalf, you must provide all material facts. Failure to disclose such necessary information or disclose false information could invalidate any insurance cover in the event of a claim.

Note to the Introducer: The Information Capture Sheet is provided for the purposes of capturing client's cover requirements prior to producing a full quotation using the Source software. Submission to underwriters of an Information Capture Sheet is not an acceptable means of application. A fully completed Application Form produced from the Quotation Documentation section of the software and submitted electronically is the only acceptable means of submitting new business to underwriters for acceptance.

1. FIRST APPLICANT'S DETAILS

Title	Forename	Gender
<input type="text"/>	<input type="text"/>	<input type="text" value="Male / Female"/>
Surname	Date of Birth	
<input type="text"/>	<input type="text" value="/ /"/>	
Employment Status		
<input type="text" value="Employed / Self-employed / Unemployed / Retired"/>		
Occupation		
<input type="text"/>		
Current Employer Name	Nature of Business	
<input type="text"/>	<input type="text"/>	
Length of Service	Does Applicant 1 smoke?	
<input type="text" value="Year(s)"/> <input type="text" value="Month(s)"/>	<input type="text" value="Yes / No"/>	

2. SECOND APPLICANT'S DETAILS

Title	First name(s)
<input type="text"/>	<input type="text"/>
Surname	Date of Birth
<input type="text"/>	<input type="text"/>
Employment Status	
<input type="text" value="Employed / Self-employed / Unemployed / Retired"/>	
Occupation	
<input type="text"/>	
Current Employer Name	Nature of Business
<input type="text"/>	<input type="text"/>
Length of Service (in months)	Does Applicant 2 smoke?
<input type="text"/>	<input type="text" value="Yes / No"/>

3. CONTACT DETAILS

Correspondence Address (please also note insured address if different)

Postcode:

Daytime Tel	Evening Tel
<input type="text"/>	<input type="text"/>

4. COVER DETAILS

Type of Cover Required

- Mortgage Protection – Accident, sickness & unemployment
- Mortgage Protection – Unemployment only
- Mortgage Protection – Accident & sickness only
- Income Protection – Accident, sickness & unemployment

Monthly Cover Required

1 st App. Net Monthly Income	2 nd App. Net Monthly Income
<input type="text" value="£"/>	<input type="text" value="£"/>
1st App. Monthly Cover	2 nd App. Monthly Cover
<input type="text" value="£"/>	<input type="text" value="£"/>
Policy Excess (in days)	Cover Commencement Date
<input type="text" value="0 / 30 / 60 / 90"/>	<input type="text" value="/ /"/>

Type of scheme

Mortgage Details

Mortgage Start Date	Lender
<input type="text" value="Month / Year"/>	<input type="text"/>
Mortgage Loan Amount	Monthly Mortgage Repayment
<input type="text" value="£"/>	<input type="text" value="£"/>
Other Mortgage Related Payments	
<input type="text" value="£"/>	

5. UNDERWRITING QUESTIONS

Please read the following statements carefully and tick only those which apply

- | | | |
|--------------------------|--------------------------|---|
| App.
1 | App.
2 | |
| <input type="checkbox"/> | <input type="checkbox"/> | The applicant is working for less than 16 hours per week (All work must be within the United Kingdom, Channel Islands or Isle of Man) |
| <input type="checkbox"/> | <input type="checkbox"/> | The applicant's work is temporary, casual or seasonal or includes any work for a temporary employment agency. |
| <input type="checkbox"/> | <input type="checkbox"/> | The applicant has been registered as unemployed within the last 12 months. |
| <input type="checkbox"/> | <input type="checkbox"/> | The applicant is aware of circumstances which may result in them becoming unemployed. |
| <input type="checkbox"/> | <input type="checkbox"/> | The applicant is in dispute or in the course of any disciplinary action with their employer (including any performance related issues). |
| <input type="checkbox"/> | <input type="checkbox"/> | The applicant has consulted a doctor (or consultant) in the last 12 months. |