Macquarie Life
Indicative pre-assessment

MACQUARIE

Any information we provide you about premiums, loading, exclusions or other terms will be given in good faith and may be used in the underwriting process. The results of this pre-assessment are indicative only and should not to be treated as either a recommendation, a specific offer of insurance cover, or the issuing of any policy of insurance. Any cover, if available, would be subject to an application for insurance and full underwriting, as well as any additional requirements requested at time of underwriting.

1 Adviser details

Adviser name: _____ Date of pre-assessment: _____

Dealer group: _____ Phone number: _____

2 Details of person to be insured

Title: _____ Full given name(s): _____

Surname: _____ Date of birth: _____

Occupation: _____

Gender: ☐ Male ☐ Female Smoking status: ☐ Smoker ☐ Non-smoker

3 What is being applied for?

☐ **Life** $ _____

☐ **TPD** $ _____

Definition: ☐ Own occupation ☐ Any occupation ☐ Home duties ☐ Modified

☐ **Trauma**

- ☐ Standard $ _____
- ☐ Platinum $ _____
- ☐ Plus $ _____

☐ **Income protection** $ _____ /month

Waiting period: ☐ 30 days ☐ 60 days ☐ 90 days ☐ 1 year ☐ 2 years

Benefit period: ☐ 2 years ☐ 5 years ☐ To age 65 ☐ To age 70

☐ **Business Expenses** $ _____ /month

Waiting period: ☐ 30 days ☐ 90 days

☐ **Blood borne disease** $ _____

4 Client information

Medical information

Financial information

5 Underwriting response

Underwriter rationale

Decision

Underwriting requirements

Pre-assessment reference number:

Signature of underwriter

Date:

Underwriter's name:

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