

**FINANCIAL QUESTIONNAIRE - PERSONAL COVERAGE** (to be completed by Proposed Insured)

Name: \_\_\_\_\_ Application No.: \_\_\_\_\_

Amount applied for: \_\_\_\_\_ Beneficiary(ies): \_\_\_\_\_

Amount of Insurance In Force or Pending	Purpose of Insurance	Year Issued (If pending, please state so)	WP and/or ADB Amount

Purpose:  Estate Preservation  Creditor  Income Replacement  Other: \_\_\_\_\_

How was the amount determined? \_\_\_\_\_

**PERSONAL INCOME AND NET WORTH**

**ANNUAL EARNED INCOME**

Salary (Draw if Self-Employed): \$ \_\_\_\_\_  
 Bonus: \$ \_\_\_\_\_  
 Commission: \$ \_\_\_\_\_  
 Other Earnings \$ \_\_\_\_\_  
 \$ \_\_\_\_\_  
 \$ \_\_\_\_\_  
 Total Earned Income: \$ \_\_\_\_\_ **0.00**

**ASSETS**

Cash: \$ \_\_\_\_\_  
 Life Insurance Net Cash Value: \$ \_\_\_\_\_  
 Real Estates: \$ \_\_\_\_\_  
 Business Equity: \$ \_\_\_\_\_  
 Stocks (not including above): \$ \_\_\_\_\_  
 Bonds \$ \_\_\_\_\_  
 Other: \$ \_\_\_\_\_  
 \$ \_\_\_\_\_  
 Total Assets: \$ \_\_\_\_\_ **0.00**

**ANNUAL UNEARNED INCOME**

Dividends: \$ \_\_\_\_\_  
 Interest: \$ \_\_\_\_\_  
 Net Rentals: \$ \_\_\_\_\_  
 Other: \$ \_\_\_\_\_  
 \$ \_\_\_\_\_  
 \$ \_\_\_\_\_  
 Total Unearned Income: \$ \_\_\_\_\_ **0.00**

**LIABILITIES**

Mortgages: \$ \_\_\_\_\_  
 Personal Loans: \$ \_\_\_\_\_  
 Liens/Judgements: \$ \_\_\_\_\_  
 Other: \$ \_\_\_\_\_  
 \$ \_\_\_\_\_  
 Total Liabilities: \$ \_\_\_\_\_ **0.00**

**NET WORTH:** \$ \_\_\_\_\_ **0.00**

I hereby agree that the foregoing questions and answers shall form part of the application for insurance made by me to BMO Life Assurance Company on the \_\_\_\_\_ day of \_\_\_\_\_ 20 \_\_\_\_ ; and they shall be of the same effect as if contained in the original application.

Dated at \_\_\_\_\_ this \_\_\_\_\_ of \_\_\_\_\_ 20 \_\_\_\_\_

Witness

Proposed Insured