

Underwriting questionnaire



Foreign National

This questionnaire is for Foreign Nationals or if your client is not a U.S. citizen seeking U.S.-based insurance. If the client is a U.S. citizen or Green Card holder, please use the [Foreign Travel questionnaire](#).

Producer Name _____ Phone _____ Date _____

Client Name _____ Date of Birth _____

☐ Male ☐ Female Face Amount _____ Max Premium \$ _____ /yr.

☐ Term ☐ Permanent Has the client ever used any form of tobacco (cigarettes, cigars, pipe, snuff, etc.)? ☐ Yes ☐ No

Frequency _____ Date of last use _____ Type _____

CLIENT INFORMATION	
Occupation	
Income	
Citizenship	
Does the client have a U.S. Visa	<input type="checkbox"/> Yes <input type="checkbox"/> No If Yes, Type _____ Expiration date _____
Does the client have a Tax ID	<input type="checkbox"/> Yes <input type="checkbox"/> No
Does the client have a Social Security number	<input type="checkbox"/> Yes <input type="checkbox"/> No
Current residence	
Primary residence	
Location(s) of owned homes	
If the client currently resides in the U.S., how long do they intend to remain in the U.S.	
Company	
Where is the company domiciled	
Location of work and duties	
Location of primary care physician	
Bank in U.S. Mainland	

IMMEDIATE RELATIVES WITH US CITIZENSHIP OR GREEN CARD LIVING IN U.S.? ☐ Yes ☐ No

If yes, relation?



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ASSETS AND LIABILITIES IN US DOLLARS BY COUNTRY

Assets/Liabilities	Total Worldly	In the US Only	Outside the US (list country)
Assets			
Liabilities			
Net Worth			

TRAVEL: PRIOR 12 MONTHS (list all travel)

City/Country	Reason	Number of Trips/Dates	Total Days

TRAVEL: NEXT 12 MONTHS (list all travel)

City/Country	Reason	Number of Trips/Dates	Total Days

INSURANCE: APPLIED FOR COVERAGE

Type/Face Amount	Owner and Beneficiary	Life Insurance Company	Insurance Need/Reason

INSURANCE: IN-FORCE COVERAGE

Type/Face Amount	Date Policy was Issued	Owner and Beneficiary	Life Insurance Company	Insurance Need/Reason

Type of insurance desired ☐ Personal ☐ Business

Will the proposed insured be the owner of the policy ☐ Yes ☐ No If No, list owner and address of owner below



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