

# Underwriting Questionnaire

## Financial Supplement for Business Insurance



Producer Name \_\_\_\_\_ Phone \_\_\_\_\_ Date \_\_\_\_\_

Client Name \_\_\_\_\_ Date of Birth \_\_\_\_\_

Male  Female Owner \_\_\_\_\_ Beneficiary \_\_\_\_\_

### Assets

Cash and cash equivalents \$ \_\_\_\_\_  
 Accounts receivable \$ \_\_\_\_\_  
 Inventories \$ \_\_\_\_\_  
 Prepaid expense \$ \_\_\_\_\_  
 Investments held for trading \$ \_\_\_\_\_  
 Property, plant, and equipment \$ \_\_\_\_\_  
 Goodwill \$ \_\_\_\_\_  
 Other intangible fixed assets \$ \_\_\_\_\_  
 Deferred tax assets \$ \_\_\_\_\_

**TOTAL ASSETS** \$ \_\_\_\_\_

Net income for last tax fiscal year \$ \_\_\_\_\_

Net income after tax current fiscal year \$ \_\_\_\_\_

### Liabilities

Accounts payable \$ \_\_\_\_\_  
 Current income tax liabilities \$ \_\_\_\_\_  
 Bank loans \$ \_\_\_\_\_  
 Other tax liabilities \$ \_\_\_\_\_  
 Issued debt securities \$ \_\_\_\_\_  
 Deferred tax liabilities \$ \_\_\_\_\_  
 Minority interest and equity \$ \_\_\_\_\_  
 Other liabilities \$ \_\_\_\_\_  
**TOTAL LIABILITIES** \$ \_\_\_\_\_

**NET WORTH** \$ \_\_\_\_\_

Retained earnings/stockholder equity \$ \_\_\_\_\_

Fair market value of business \$ \_\_\_\_\_

Type of business

C Corp  S Corp  Partnership  Sole Proprietorship  LLC  LLP

Number of employees \_\_\_\_\_ Year established \_\_\_\_\_ Description of business (mfg., retail, etc.) \_\_\_\_\_

Purpose of insurance

Key person  Buy/Sell  Stock redemption  
 Loan  Deferred Comp  Other \_\_\_\_\_

If **Buy/Sell**, provide names of all partners, percent of business owned, and amount of buy/sell insurance in force and applied for

_____	_____ %	\$ _____
_____	_____ %	\$ _____
_____	_____ %	\$ _____
_____	_____ %	\$ _____

If **Key Person**, are all other key persons covered by or applying for comparable amounts of insurance  Yes  No If no, explain below

If **Loan**, provide loan amount \$ \_\_\_\_\_ and purpose of loan \_\_\_\_\_

Any bankruptcy  Yes  No If yes, include dates of discharge, type, and details below

Is firm involved in any judgements, lawsuits, or pending court proceedings  Yes  No If yes, explain below



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