

SURRENDER QUESTIONNAIRE



Policy No.: **Type of Policy:**

Name: **Age:**

1. How long has this policy been in force?
2. Were you advised to Surrender? YES NO
3. What is the main reason for Surrender? **(Please tick the most appropriate box)**

a) Retired	<input type="checkbox"/>	b) Other investments	<input type="checkbox"/>	c) Dissatisfied with agent's service	<input type="checkbox"/>
d) Financial	<input type="checkbox"/>	e) Dissatisfied with policy	<input type="checkbox"/>	f) Replacement/transfer of monies	<input type="checkbox"/>
g) Education	<input type="checkbox"/>	h) Loan too high	<input type="checkbox"/>	i) Policy no longer needed/interested	<input type="checkbox"/>
j) Migrated	<input type="checkbox"/>	k) Unemployed	<input type="checkbox"/>	l) Surrendered by Bank	<input type="checkbox"/>
m) Other	<input type="checkbox"/>	Please specify:			
4. Do you have sufficient coverage to provide for your future? Yes No
5. If NO to question four (4), how do you plan to provide for your future?

6. Did the policy serve the purpose for which it was originally taken? Yes No
Please specify:

7. Are you aware of the following options available on this policy? **(Please tick all relevant boxes)**

Policy Loan	<input type="checkbox"/>	Reduction in Premium	<input type="checkbox"/>	Reduction of Sum Insured	<input type="checkbox"/>
Reduced Paid Up	<input type="checkbox"/>	Vesting of Policy	<input type="checkbox"/>	Withdrawal on Accumulation	<input type="checkbox"/>
Premium Holiday	<input type="checkbox"/>	Withdrawal of Bonus	<input type="checkbox"/>		
8. On a scale of 1 -10, with 10 being the highest, how would you rate our service?

1	2	3	4	5	6	7	8	9	10
Fair				Good					Excellent
9. What recommendation/s would you make to TATIL for the future?

Signature of Policy Owner _____

Date (dd/mm/yyyy) _____

For Official Use Only

Comments

A) Attending Agent / CSR:

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Cash Surrender Value \$ _____

Date _____
(dd/mm/yyyy)

Print Name

Signature

B) Conservation Officer:

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Print Name

Signature

C) Manager / Executive:

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Print Name

Signature