

**CONSUMERS GUARANTEE ACT 1993
SPECIFIED REVIEW CHECKLIST**

I, (name in full) _____ state the purpose(s)
of this review is/are as indicated below:

Specified Review – Business

Tick as Applicable

	YES	NO
1. To provide a cash sum on the death/total and permanent disablement of a shareholder/partner to fund a Business Succession Agreement.	r	r
2. To provide a cash sum on diagnosis of a defined critical illness of a shareholder/partner/keyperson e.g. stroke, cancer, kidney failure, heart attack, blindness.	r	r
3. To provide a cash sum on the death/total and permanent disablement of a keyperson to cover loss of profit and/or debt reduction.	r	r
4. To provide a cash fund to extinguish personal guarantees	r	r
5. To provide a cash sum for an employee buy out.	r	r
6. To provide funding for retirement, liquidity and solvency testing.	r	r
7. To provide a tax efficient plan in repayment of company loans and liabilities.	r	r
8. To provide mortgage/debt repayment protection and mortgage facilities.	r	r
9. To provide a monthly income in the event of a disability by either illness or accident.	r	r
10. To provide a monthly income to pay business expenses/ overheads in the event of a disability by either injury or accident.	r	r
11. To provide health insurance benefits.	r	r
12. To analyse and complete an investment/insurance audit.	r	r
13. To consider group/voluntary employee benefits: superannuation, group life, health, disability income protection and other employee benefits.	r	r
14. Other (Please specify) _____ _____	r	r

Note: any premium rates quoted assume acceptance at normal rates and are subject to underwriting.

Signature of Plan Owner/Life Insurance _____ Date _____
(Life Insured if Plan Owner a Financial Institution)

Signature of Broker _____ Date _____