

QUESTIONNAIRE · MORTGAGE LIFE INSURANCE

Mortgage life insurance questionnaire

Information needed for your study — to be returned to info@assudire.fr

Answer what applies to you: only your contact details are required. No medical questions: if the insurer has any, it asks you itself, in confidence.

1. YOU

The policyholder.

Title : ☐ Mrs / Ms ☐ Mr First name : Last name :Date of birth : Marital status : ☐ Single ☐ Married / civil partnership ☐ Living with partner
☐ Divorced ☐ Widowed

Address : Postcode : Town :

Phone : Email :

Occupation : Status : ☐ Employee ☐ Self-employed ☐ Retired ☐ Student ☐ Not working

2. THE LOAN

The loan to insure, or whose insurance you want to switch.

Type of request : ☐ New loan ☐ Switching insurance (Lemoine law) ☐ Renegotiation or buy-outPurpose of the loan : ☐ Main residence ☐ Second home ☐ Buy-to-let ☐ Works ☐ Business loanLending bank : Postcode of the property : Property in France : ☐ Yes ☐ No ☐ Being purchased

Amount borrowed : € Term : years Interest rate : % Signing date (or planned) :

Outstanding capital (if switching) : Current cost of the insurance : Current insurance : ☐ Bank's policy
☐ Other insurer (delegation)

Other loans to insure (amount, term, type: repayment, interest-only, PTZ, bridging) :

3. THE BORROWERS

You, and the co-borrower if any.

Co-borrower : ☐ No ☐ Yes — to be insured too Co-borrower: full name :

Co-borrower's date of birth : Co-borrower's occupation :

Cover split wanted : ☐ 100 % ☐ 50 % ☐ Other / to be decided If other: split :

4. YOUR PROFILE

Pricing criteria, health aside.

Smoker (last 12 months) : ☐ No ☐ Yes **Co-borrower smokes :** ☐ No ☐ Yes

Type of work : ☐ Office / desk-based ☐ Manual / building site ☐ Medical profession ☐ Frequent travel ☐ Other

Over 20,000 km a year for work : ☐ No ☐ Yes **Working at height or carrying heavy loads :** ☐ No ☐ Yes

Sports : ☐ No high-risk sport ☐ Motor sports ☐ Diving ☐ Air sports ☐ Mountaineering / climbing
☐ Combat sports

5. YOUR NEEDS

Cover wanted : ☐ Death + total loss of autonomy ☐ + total disability / incapacity (recommended) ☐ + partial disability (maximum cover) ☐ Those required by the bank

Options : ☐ Back and mental health without exclusion ☐ Job loss ☐ Buy-back of sport or job exclusions
☐ Short waiting period

Start date wanted : ☐ As soon as possible ☐ Within a month
☐ When the loan is signed ☐ Later

Target budget : € / month

Details, constraints or questions :

6. DOCUMENTS TO ATTACH

Photos or scans are fine.

☐ Loan offer or repayment schedule ☐ Standard information sheet (FSI) ☐ Terms of the current insurance
☐ ID document ☐ Bank details (IBAN)

No medical information is requested here. The health questionnaire, if required, is sent to you directly by the insurer and stays confidential. Since the Lemoine law, there is none for a home loan whose insured share is under €200,000 and which ends before you turn 60.

DECLARATION AND SIGNATURE

I certify that the information above is accurate; it forms the basis of the study and, where applicable, of the policy. Any concealment or misrepresentation is subject to the penalties of articles L.113-8 and L.113-9 of the French Insurance Code. ASSUDIRE processes the data collected to study my needs and manage the policy, under the conditions of the information document (section 8); I agree to be contacted.

Signed at: **Date:**

The policyholder

Signature

For ASSUDIRE use

Received on · adviser · study reference