



Source of Wealth & Funds Questionnaire

Policy Name

Policy Number

Please provide below full details of how you acquired the money which you want to invest in your policy held with LCL.

Please note, we will not accept generic descriptions or one-word answers such as “savings”, “investments”, “inheritance”, or “business dealings”. Please continue on a separate sheet if necessary.

Source of Wealth:	Information:

Examples of Source of Wealth:	Information required:
Employment	Name & address of employer, type of business, position held and average salary.
Proceeds of a policy	Company held with, policy number, amount and date received.
Sale of investments	Description of investment, amount and date received.
Sale of a property	Address, amount and date received.
Sale of a Company or business	Name & nature of Company/business, address, date of sale and amount received.
Inheritance	Name of deceased, relationship with deceased, date of death and amount received.
Other sources	Description and details of source, amount and date received.

Please contact us if your circumstances have not been covered above so we can advise what information will be required.

What is the purpose of the investment/policy? E.g. saving for retirement, school fees etc.

Declaration: I/we declare that to the best of my/our knowledge and belief the information given in this questionnaire is true and complete.

Policyholder 1

Policyholder 2

Signature

Signature

Date signed

Date signed

LCL International is a trading name of LCL International Life Assurance Company Limited, part of Charles Taylor

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