

1. POLICY DETAILS

Type of Policy Applied For I-Credit Mortgage CPI I-Credit Other CPI

Cover Amount Requested (Up to R300 000 maximum) – Amount Requested: R _____

2. PROPOSED INSURED (Person to be Insured)

Full Name (as per ID) _____ Date of Birth (DD / MM / YYYY) _____

SA ID / Passport Number _____ Age _____ Cellphone Number _____

Email Address _____ Citizenship _____ Marital Status _____

Gender Male Female Other

IMPORTANT: Please attach a certified copy of your South African ID / Passport with this application.

3. BANKING DETAILS (For Premium Collection)

Account Holder Name _____ Bank Name _____

Account Number _____ Branch Code _____ Debit Order Date (DD / MM / YYYY) _____

Account Type Savings Cheque Transmission

IMPORTANT: An SMS will be sent to the policyholder with a link to approve all debits.

4. BENEFICIARY DETAILS (Attach Extra Pages if Needed)

Full Name	ID / Passport Number	Date of Birth	Relationship

5. AUTHORIZATIONS & DISCLOSURES

Declaration: I declare all statements in this application are true and complete to the best of my knowledge.

I understand that misrepresentation or omission may result in denial of coverage or rescission of the policy.

Authorization: I authorize the insurer to obtain medical records, prescription history, driving records, and other relevant information necessary for underwriting purposes.

Do you consent to the insurer obtaining your medical and personal information for underwriting? YES NO

6. SIGNATURES

POLICYHOLDER SIGNATURE _____ DATE (DD / MM / YYYY) _____ AGENT / INTERMEDIARY SIGNATURE _____

Sales Agent / Intermediary Name _____ Agent FSP Number _____ Agent Date (DD / MM / YYYY) _____

IMPORTANT NOTES – CLAIMS REQUIREMENTS

- Death Benefit: Completed claim form, certified Death Certificate, certified ID, accident/police report if unnatural, BI1663 form.
- Disability: Disability claim form, ID, occupation details, medical report from treating specialist, sick leave records.
- Retrenchment: Official claim form, ID, occupation details, and proof of retrenchment from employer.
- Claims within 12 months of event. Disputed claims within 90 days.
- Cooling off: 31 days from receipt of terms & conditions.

