PRU LIFE U.K.

ENTERPRISE BUSINESS PROPOSAL REQUEST FORM

Servicing Agent's Information		
Agent Code		License Type: ☐ Traditional ☐ Variable
Agent Name		
Designation		
Branch Affiliation		
Sector	**VisMin**	
Contact Details	☎	📧

Company Prospect's Information	
Contact Person's Name	
Designation	
Company Name	
Company Address	
Nature of Business	
Number of Regular Employees	

Corporate Program: Check the corporate program you would like to offer	
PROGRAM	**REQUIREMENTS TO BE SUBMITTED**
☐ **GROUP PERSONAL ACCIDENT** *Desired Amount of Coverage*: **ADD (Long Scale)** **Burial Benefit (Core benefit)** ***Optional benefits*** ☐ PA – Total & Permanent Disability ☐ Murder and Assault ☐ Accidental Medical Reimbursement ☐ Accidental Hospital Income Benefit	
☐ **GROUP TERM LIFE** *Desired Amount of Coverage*: _____ **Life Benefit (Core benefit)** ***Optional benefits*** ☐ Accidental Death and Disablement Benefit (Short Scale) ☐ Total and Permanent Disability ☐ Crisis Cover Benefit	Census (in Excel file) containing the ff: ☐ Name of employees/members/students ☐ Date of birth (DD/MM/YYYY) ☐ Specific occupation e.g. Office Staff, Driver, Engineer
☐ **COMBO-GOLD** *Desired Amount of Coverage*: _____ **Life Benefit (Core benefit)** **ADD (Long Scale)** **Burial Benefit (Core benefit)** ***Optional benefits*** ☐ Total and Permanent Disability ☐ Murder and Assault	

☐ Crisis Cover Benefit ☐ Accidental Medical Reimbursement ☐ Accidental Hospital Income Benefit	

EXISTING BENEFITS AND CLAIM HISTORY			
Do you have an existing provider?			
If yes, with whom?			
For how many years?			
Claims History	Year 1	Year 2	Year 3
Total Premiums Remitted			
No. of Cases			
Total Amount of Claims			

€ MORTGAGE REDEMPTION INSURANCE – Please provide the following information:

PORTFOLIO DETAILS

Coverage: ☐ New Borrowers ☐ Both ☐ Existing Borrowers

Total Number of Borrowers (year to date):	
Projected Number of Borrowers for the current year:	
Projected Number of Borrowers for the next year:	
Total Amount of Loans Released to Date:	

Characteristics of the Group

Age Distribution	Percentage out of Total Borrower Count
18 - 29 years old	%
30 - 39 years old	%
40 - 49 years old	%
50 - 59 years old	%
60 - 64 years old	%
Total	

Occupation:	Percentage out of Total Borrower Count
1	%
2	%
3	%
4	%
5	%
Total	

ELIGIBILITY

Minimum Age	

Maximum Age	
Exit Age	

LOAN DETAILS			
Loan Type:	Minimum Amount	Average Amount	Maximum Amount
Mortgage Laon			
Personal Loan			
Business Loan			
Others:			
Loan Term	Minimum Term (years)	Average Term (years)	Maximum Term (years)
Mortgage Laon			
Personal Loan			
Business Loan			
Others:			

Notes:

1. Please send this form and the requested information to your assigned Enterprise Business Manager.

SECTOR	EB SALES	EMAIL ADDRESS
Metro Manila Central	Allan Acosta	allan.acosta@prulifeuk.com.ph
Metro East	Ramiro Navarro	ramiro.s.navarro@prulifeuk.com.ph
Metro North	Vanessa Cabusora	
Metro South	Bianca Pauline Jordan	bianca.pauline.jordan@prulifeuk.com.ph
Visayas and Mindanao	Arlette Maratas	Arlette.maratas@prulifeuk.com.ph

2. Turnaround time will start upon receipt of complete details of this form and submission of the employees list with complete details.