

PRE-INTERVIEW FORM
(Agency Application – Individual Agent/Nominee Agent)

Important:

- (A) Please ensure you have all the relevant certificates.
i.e. CGI (old syllabus) or BCP & PGI & ComGI (new syllabus) and HI (where applicable)
 - (B) You must answer **ALL** questions. If any question does not apply to you, please write “NA”.
 - (C) We will review your application & contact you for an interview (if successful) within 2 weeks from date of receipt of this form.
 - (D) Upon completion of this form, please fax to **6225 5145** for processing.
-

1. Are you a Life Agent? Yes No (proceed to Q2.)
 If yes, please complete the following questions (i to iv)
 - i) Which life insurance company do you represent?
 AIA Aviva AXA Life Great Eastern HSBC Manulife
 NTUC Prudential Tokio Marine Others (please specify) _____
 - ii) Are you an Agency Leader? Yes No
 - iii) How many years have you been in the life insurance industry? _____
 - iv) How many life clients do you currently have? _____
 - v) What is your latest production for Life Insurance? _____
 - vi) Have you ever sold General Insurance products (e.g. travel, personal accident, personal lines policies, etc) as a commissioned agent? Yes No (proceed to Q5.)

If yes, please complete the following:
2. How many years have you been in the General Insurance Industry? _____
3. Do you represent any other general insurance companies (e.g. Tenet, QBE, Allianz, etc) to sell general insurance products? Yes No
 If yes, please answer the following: (Primary Principal) _____
 (Secondary Principal 1) _____
 (Secondary Principal 2) _____
4. Please provide a detailed breakdown of your general insurance portfolio sales:

| | |
|--|---------|
| I Consumer Lines (<i>Personal Accident, Travel, Motor, Home, Golfers</i>) | _____ % |
| II Commercial Lines (<i>Workmen’s Compensation, Public Liability, Marine Cargo, Fire, Burglary, Professional Indemnity, D&O, etc.</i>) | _____ % |
| Last Annual Total Production S\$ _____ | |
5. How much general insurance business do you expect to place with Chartis Singapore Insurance Pte Ltd in one year?
 S\$10,001 – S\$30,000 S\$30,001 – S\$50,000 S\$50,001 – S\$99,999 > S\$100,000

6. What will be your area of focus for General Insurance?

I Consumer Lines (*Personal Accident, Travel, Motor, Home, Golfers*) S\$ _____

II Commercial Lines (*Workmen's Compensation, Public Liability, Marine Cargo, Fire, Burglary, Professional Indemnity, D&O, etc.*) S\$ _____

-----**Declaration**-----

a. Have you and/or your nominee agent(s) been terminated by any insurance company? Yes No

If yes, which insurance company, when and why? _____

b. Have you and/or your nominee agent(s) been convicted of any offence under any Court of Law?

Yes No

If yes, what offence were you and/or your nominee agent(s) convicted of and when?

c. Have you and/or your nominee agent(s) been declared a bankrupt? Yes No

If yes, have you and/or your nominee agent(s) been discharged?

Yes (Discharged on _____) No

d. Has any proceeding of any nature been taken against you and/or your nominee agent in any Court of Law?

Yes No

If yes, please give details.

e. I am aware that I need to fulfill the following:

(i) **CPD Hours (1 January – 31 December)**

| | Agent Type | CPD Requirement |
|--------------------------|--|---|
| <input type="checkbox"/> | Composite Agent <i>(selling life and general insurance products)</i> | 30 Hours (Life Insurance) & 8 Hours (General Insurance) |
| <input type="checkbox"/> | General Agent <i>(selling general insurance products only)</i> | 24 Hours (1 st year as a General Agent) 24 Hours (2 nd year as a General Agent) 15 Hours (3 rd year as a General Agent) |

(ii) **Minimum Production Requirement (1 December – 30 November)**

of _____

I, [_____] [NRIC/Passport No. _____],

hereby declare that all the information furnished above is true and correct. In the event of a false declaration being made on this form, Chartis Singapore Insurance Pte Ltd reserves the right to cancel my application or terminate my agency representation if I am subsequently accepted as an agent.

Signature _____ Date _____ HP No. _____