

SECTION A: To be filled up by Sales team:

APPLICANT'S NAME (as per IC)

ID NO:

POLICE ID NO:

PRODUCT		APPLICATION TYPE		WASIAT OPTION
<input type="checkbox"/> IPFR	<input type="checkbox"/> IP11 (IDSB)	<input type="checkbox"/> New	<input type="checkbox"/> Appeal	<input type="checkbox"/> Yes
<input type="checkbox"/> IPFP	<input type="checkbox"/> IPFG (MBSB)	<input type="checkbox"/> Top-Up	<input type="checkbox"/> Overlap	<input type="checkbox"/> No
PENSION PAYROLL STATUS		CHANNEL		BRANCH DETAILS
<input type="checkbox"/> JPA	<input type="checkbox"/> New	<input type="checkbox"/> B = Branch	<input type="checkbox"/> C = Agent	BR. NAME <input type="text"/>
<input type="checkbox"/> JHEV	<input type="checkbox"/> Existing	<input type="checkbox"/> E = Easy	<input type="checkbox"/> J = Telesales	BR. CODE <input type="text"/>

DATA ENTRY (FOR CREDIT APPROVAL DEPT USE ONLY)

SECTION B: For Data Entry use only

AA NO:

SECTION C: For Credit Processing use only

CREDIT CHECK (FOR CREDIT APPROVAL DEPT USE ONLY)

CCRIS	<input type="checkbox"/> Pass	<input type="checkbox"/> Fail	AML	<input type="checkbox"/> +ve	<input type="checkbox"/> -ve
CTOS	<input type="checkbox"/> +ve	<input type="checkbox"/> -ve	PEP	<input type="checkbox"/> +ve	<input type="checkbox"/> -ve
Connected Party	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Instinct	<input type="checkbox"/> +ve	<input type="checkbox"/> -ve

DECISION & CREDIT MGMT COMMENT (FOR CREDIT APPROVAL DEPT USE ONLY)DECISION / ESCALATION COMMENTS:
☐

DECLINED

APPROVED

SDR:

FIN. AMOUNT:

DSR:

PROFIT RATE:

EC DONE:

TENURE:

☐

CLEAN

☐

DEBT CONSOLIDATION ≤ 3 RED. A/C

☐

DEBT CONSOLIDATION > 3 RED. A/C

ESCALATED BY:

NAME

SIGNATURE

DATE

APPROVED BY:

NAME

SIGNATURE

DATE

FOR MAINTENANCE IN ACTIVATE SCREEN**DATE RECEIVED**

RAISED BY:	CREDIT ANALYST	NAME	UPDATED BY
APPLICATION DETAILS / REDEMPTION			
FINANCIAL DETAILS			
SECURITY/CTC DETAILS			
EMPLOYMENT DETAILS			
PERSONAL DETAILS			
SUPPORTING DOCUMENTS DETAILS			
RAISED BY:	TV OFFICER	NAME	UPDATED BY
APPLICATION DETAILS / REDEMPTION			
FINANCIAL DETAILS			
SECURITY/CTC DETAILS			
EMPLOYMENT DETAILS			
PERSONAL DETAILS			
SUPPORTING DOCUMENTS DETAILS			