



# Tax Risk Insurance

## Proposal and Declaration

### Cover for Individuals (Investec)

for sole traders, companies and trusts, please complete the Cover for Companies or Cover for Trusts proposal form

Initials & Surname (Proposer)			
Title			First names
Identity Number			
Occupation			
Tax Reference Number			
Postal Address			Code
Contact Details	(w)	(h)	(c)
E-mail Address			
Name of Your Tax Accountant / Auditor			Tel
Name of Your Insurance Broker	AON South Africa (Pty) Ltd an authorised FSP 20555		Tel 0860 746 466
			Email: investecsales@aon.co.za

### Product

#### PREMIUM RATES & INDEMNITY LIMITS

The Indemnity Limit is equal to the Annual Rand Limit or the Annual Hours Limit, whichever is the lesser.

#### Fixed Salary Income Earners

If you earn a fixed monthly income from a single permanent employer (including basic plus commission and/or annual bonus)

Less than R1 000 000	R43	R50 000 per annum limited to R25 000 per claim
R1 000 001 to R2 000 000	R99	R110 000 per annum limited to R67 500 per claim
R2 000 001 to R3 000 000	R99	R110 000 per annum limited to R67 500 per claim
R3 000 001 to R4 000 000	R239	R300 000 per annum limited to R150 000 per claim
R4 000 001 to R5 000 000	R239	R300 000 per annum limited to R150 000 per claim
R5 000 001 to R6 000 000	R350	R450 000 per annum limited to R225 000 per claim
R6 000 001 to R7 000 000	R350	R450 000 per annum limited to R225 000 per claim





### Variable Income Earners

If you earn income from variable sources such as commission only, contract work, multiple employers etc, or if you are a provisional taxpayer.

Less than R1 000 000	R168	R110 000 per annum limited to R67 500 per claim
R1 000 001 to R2 000 000	R168	R110 000 per annum limited to R67 500 per claim
R2 000 001 to R3 000 000	R168	R110 000 per annum limited to R67 500 per claim
R3 000 001 to R4 000 000	R239	R300 000 per annum limited to R150 000 per claim
R4 000 001 to R5 000 000	R239	R300 000 per annum limited to R150 000 per claim
R5 000 001 to R6 000 000	R350	R450 000 per annum limited to R225 000 per claim
R6 000 001 to R7 000 000	R350	R450 000 per annum limited to R225 000 per claim
More than R7 000 000	POA	Your annual income? R

Product Type	<b>Cover for Individuals</b>	Premium Payment Method	Monthly Debit Order
Policy Inception Date	/ / 20		
Premium Payable	R	including 20% broker commission.	

### Declaration & Protection of Personal Information Consent

I hereby warrant that all the statements included on all the pages of this Proposal Form are true, accurate and complete and contain all information known to me which may affect the risk to be insured under this Policy, and that this and any other written statement made by me or on my behalf for the purpose of the proposed insurance shall be the basis of, and incorporated in the contract between myself and the Insurer. I agree to accept the insurance on the terms and conditions set forth in the Policy wording, Schedule and any endorsements as applicable.

I acknowledge that the sharing of information for insurance, underwriting and claims purposes enables the insurers to administer policies and assess risk. Tax Risk Underwriting Managers and the Insurers undertake to keep my information confidential in terms of the Protection of Personal Information Act 4 of 2013 in regard to the acquisition, usage, retention, transmission and deletion of my personal information. However, they may disclose it to certain third parties and other insurers as required for the specific purpose of insurance, and to reduce and prevent any form of fraudulent activity. On my own behalf and on behalf of any party I represent herein, I hereby give consent and fully understand the reasons to process, use, share and retain personal information for its designated purpose. A full version of the Consent to Process Personal Information is available on [www.taxrisk.co.za](http://www.taxrisk.co.za). I have elected free choice in completing this Proposal for Insurance.



