

I. House hold's Information

Name:-		Birthdate		City			
Gender	Male	Female	Marital Status	Single	Married	State	

II. Employment Details

Govt. Sector	<input type="checkbox"/>	Private Sector	<input type="checkbox"/>	Self Employed	<input type="checkbox"/>
Home Maker	<input type="checkbox"/>	Others	<input type="checkbox"/>	Please Specify	<input type="checkbox"/>

III. Dependent Details

No. of dependents	1	2	3	4	5	6
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Profile of Dependents

Relationship	Age	Relationship	Age
Father		Child-1	
Mother		Child-2	
Spouse		Child-3	

IV. Business Cashflows

Less than 1 crore	<input type="checkbox"/>	1-5 Crores	<input type="checkbox"/>	5-10 Crores	<input type="checkbox"/>
10-30 Crores	<input type="checkbox"/>	more than 30 Cr.	<input type="checkbox"/>		

V. Assets Owned

Category	Tick	Location	Price	No. of Assets
Self occupied House				
Additional House				
Land				
Business Premises				

VI. Type of Financial Assets owned

Categories	Tick	Below 5Lakhs	5-15Lakhs	15-50 Lakhs	50Lkhs-1Cr.	1-5Crores	more than 5 Crores
Fixed Deposits							
Bonds							
Mutal funds							
Stocks							
Pension Fund							
PPF							
Others							

Vii. Insurance Policies Held

Policies	Tick	Amount
Endowment Policy		
Unit Linked Insurance Plan		
Unit Linked Pension		
Child Plan		
Term Plan		
Others		

VIII. Liabilities

Category	Loan Amount	Tenure of Loan	Start Date	EMI
Loans				
Housing Loan				
Vehicle Loan				
Education Loan				
Personal Loan				
Other Loans				

Focused Goals	Total Amount Required	Amount Already
Marriage		
Emergency Fund		
Any others Specify		

IX. Regular Investment And Expenses

Please indicate your regular flow of investments out of your monthly income and expenses under major heads as follows

Category	Amount Committed	Nature of Transactions	
		SIP Amt.	Lump Sum Amount
Investment Portfolio			
Mutual Funds			
FD/Recurring Deposits			
Provident Fund Account			
Pension Fund Account			
PPF Account			
Stocks and Equity Shares			
Any others Specify			
EXPENSES			
Household expenses		Please state montly Expenses	

Entertainment Expenses		
House Rent		
Insurance premium Life		
Insurance premium nonLife}		
Any others Specify		

X. I consult the following when taking my financial decisions

Tick	Options
	I take financial decisions entirely on my own
	I consult my family
	I consult friends/relatives
	I consult a staff of my Bank, usually in Wealth Management or Financial Planning team
	I consult my Insurance agent
	Others (Please specify) _____

XI. Please choose the options that best describes your position:

1. What percentage of your monthly cashflow do you save?

- a) Less than 20%
- b) Between 20% - 35%
- c) Between 35% - 50%
- d) Over 50%

2. How do you save from your regular income?

- a) Save as per planned schedule

- b) Save something every month
- c) Save whatever is left after meeting expenses
- d) Do not save regularly as expenses generally exceed income

3. How are your spending habits?

- a) I stick to my budget
- b) I little control over my spending habits
- c) I don't plan for my spendings

4. For Big assets purchase I like house, car, property..

- a) I rely on debt.
- b) Open to use debt efficiently
- c) Able to manage from my savings

5. I like to invest in instruments which _____.

- a) offer fixed guaranteed return
- b) offer slightly higher returns and largely protect capital
- c) offer substantially higher returns while there is risk of volatility

6. What is your plan for emergency?

- a) I have created an emergency fund
- b) Family Wealth
- c) Business fund
- d) I am not planned for it

7. How do you think your expenses by post retirement?

- a) Increase as per inflation
- b) Upgradation in Lifestyle
- c) Will remain same

8. What do you wish to post retirement?

- a) travel

- b) cyclotherapy
- c) if others specify _____

9. Have you planned about wealth transfer?

- a) Yes
- b) No

Remarks/Notes:



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