

First Name: Ishween

Last Name: Kaur

Date of Birth: 1999-06-01

Profession: Service

Income: 2345678

Expense: 345

Email: ishween.kaur@salesforce.com

Mobile No: 9154216117

Gender: Female

Address: B-194, Ground Floor, Fateh Nagar

Risk Profile: Moderate

Life Goals: Self Marriage

Dependents

Number of Dependents:

| Name | DOB | Relation |
|------|-----|----------|
| | | |

Stocks

| Name | Amount | Market Value | Date of Purchase | Frequency |
|------|--------|--------------|------------------|-----------|
| | | | | |

MFs

| Market Value | Amount | Type | Date of Purchase | Frequency |
|--------------|--------|------|------------------|-----------|
| | | | | |

Life Insurance

| Start Date | Premium Paying Term | Type | Sum Insured | Name | Policy Term |
|------------|---------------------|------|-------------|------|-------------|
| | | | | | |

Health Insurance

| Name | Premium Amount | Type | Sum Insured | Start Date |
|------|----------------|------|-------------|------------|
| | | | | |

Bonds

| Name | Invested | Maturity Date | Date of Investment |
|------|----------|---------------|--------------------|
| | | | |

PPF

| Invested | Date of Investment | Frequency |
|----------|--------------------|-----------|
|----------|--------------------|-----------|

Fixed Deposits

| Name | Amount | Start Date | Maturity Date |
|------|--------|------------|---------------|
|------|--------|------------|---------------|

Loan Or EMI

| Start Date | Installment Amount | Installment Left | Type |
|------------|--------------------|------------------|------|
|------------|--------------------|------------------|------|