

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
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Fixed Deposits

Name	Amount	Start Date	Maturity Date
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Loan Or EMI

Start Date	Installment Amount	Installment Left	Type
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