

ZIMMEDARI KA HUMSAFAR



Client Name:- _____

Client Address:- _____

Pin Cord :- _____

Date Of Birth :- ____/____/____ **Mobile :-** _____

Phone No. :- (____) _____ **E-Mail :-** _____

Education:- _____ **Occupation :-** _____ **Job Post :-** _____

Name Of Compnay/ :- _____ **Job Expri. :-** _____
Business **Year**

Income :- _____ **Economical Liability :-** _____ **Amount**

Number OF Child:- _____ **Child Age:-**(1) _____ (2) _____ (3) _____ (4) _____

Child DOB :- (1) _____ (2) _____ (3) _____ (4) _____

Client Anniversary Date :- _____

Personal Assets :-

House :- () Owned () Rented () Co Provided

Vehicle:- () 4 Wheeler () 2 Wheeler () None

Number Vehicle:- () 4 Wheeler () 2 Wheeler

How Many More Years Do You Intend To Work ?

(1) < 5 Year (2) 5 To 10 Year (3) 11 To 15 Year (4) 15 Year & More

What is the duration of your goals:-

Short Term:- _____ (Vacation, Dream Car etc.)

Long Term:- _____ (Child eduction, Child Marriage & Retirement)

What Age would you wish to Retire ? _____

Have you planned for your:-

- 1) Child Education _____
 - 2) Child Marriage _____
 - 3) Retirement fund _____
- (keeping inflation in consideration).

What kind of investments do you prefer the most?

(% allocation in different instruments)

- 1) Fixed Income (FD, POST, PPF) _____ %
- 2) Equity(Direct, MF, SIP) _____ %
- 3) Gold _____ %
- 4) Land & Estate _____ %

When you invest your money, your primary goal is to:-

- 1) Preserve the value of investment and minimize the risk of my wealth losing value
- 2) Generate current income and also grow the value of investments over time by taking little risk
- 3) Grow the value of investments moderately over time by taking a fair level of risk
- 4) Grow the value of investments substantially over time by taking a considerable amount of risk.

Kindly Provide Referance Of People Who You Think Can Benefit From Our Service		
Name Of The Person Referred	Contact No.	Relationship With You

Thank You