



Financial Questionnaire:

1. Which are your top 5 Priorities in your life?

- i.
- ii.
- iii.
- iv.
- v.

2. How much Loan do you have and at what Interest Rate?

Type of Loan	Amount (Rs.)	Interest Rate
i. Housing Loan	-	
ii. Car Loan	-	
iii. Extra House Loan	-	
iv. Personal Loan/CC Outstanding	-	

3. By what Percentage your income is increasing every year?

➔

4. By what Percentage your expenses are increasing each year?

➔

5. Name Two People who will help you financially in any emergency in your life?

- i.
- ii.

6. Name Two People who will be there to help your family in case if you are not there?

- i.
- ii.

7. Are you prepared for any unforeseen event financially?

➔

8. Do you believe in securing your family against losses?

➔

9. How Much Life Insurance / Medical Cover / Personal Accident cover do you have?

Sum assured Premium (approx.)

- i. Life Insurance –
- ii. Medical Cover –
- iii. Personal Accd. –
- iv. Other (car, home)–