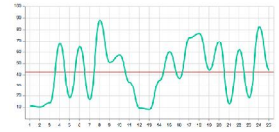


Short Financial Analysis:



- | | YES | NO | NA |
|---|--------------------------|--------------------------|--------------------------|
| 1. Have you done Risk Profiling for Investments? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Do you know what is your average savings per annum (20% or 30%) of Earning Amount? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Do you have Contingency Fund? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. Do you know Increment in your Net-worth in last One year? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. Do you know Amount of Money at work/ working out for you? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. Do you know the Growth Rate of your Assets (all assets combined)? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 7. Are you aware of the available Surplus Amount after all Expenses? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 8. Do you have an Important Financial Goal? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 9. Have you earmarked/allotted your assets towards your Important Financial Goal? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 10. Do you have a Professional Financial Planner/ Wealth Manager other than a CA/ Private Banker? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 11. Have you done Estate Planning by way of making Trust or Will or by MWPA ACT? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Name:

D.O.B.:

Email Id:

Contact no.: