

Must Information Sheet

For Mr./Ms. _____ Age:- _____
 Job/Business _____ Age at retirement from active work: _____
 Spouse Age H/W..... Kid 1 age..... Kid 2 Age.....

S. No.	Goal	Time (Years)	Present Value ₹
1	Child 1 Education		
2	Child 2 Education		
3	Child 1 Marriage		
4	Child 2 Marriage		
5	Pension		
6	Investment		
7	Tax Saving		

Risk Management

Assets		Present Responsabilités			
Cash, FD, PPF, CD etc.		Outstanding Home/Car / Personal Loan			
MF, Shares, Débentures Etc.		Rental & Household Expense Équivalent			
Life Insurance Sum Assured*		Emergency Fund			
Pension Fund					
Other Assets, Rental, Agri Income					
TOTAL Assets		TOTAL Responsabilités			
Gap between Assets & Responsabilités					
Details of Policies Taken Till Date	Policy #1	Policy #2	Policy #3	Policy #4	Other
Reason for taking out policy					
Policyholder (A, B, or Joint)					
Sum assured*					
Annual Premium					
Maturity Date					

Monthly Expenditures

Essential Expenditures ₹ _____ Other Expenditures ₹ _____

Total ₹ _____

Monthly Income

Salary/ Business Income ₹ _____ From other source (Rentals, Agri., Interests etc.) ₹ _____

Total Monthly Income ₹ _____

Disposable Monthly Income ₹ _____

Risk Attitude

Investment Type	Percentage Investment	Investment	Preference of this type	Risk Attitude
Safe Fixed Accounts/ Income	%	Endowment life insurance Bank accounts PO MIS/ RD Money market funds	<input type="checkbox"/> High <input type="checkbox"/> Moderate <input type="checkbox"/> Little <input type="checkbox"/> None	Guaranteed
Growth and Higher Income	%	Balanced mutual funds Variable life / annuities Growth mutual funds	<input type="checkbox"/> High <input type="checkbox"/> Moderate <input type="checkbox"/> Little <input type="checkbox"/> None	Moderately Secure
More Aggressive Growth	%	Stocks / equities Rentals Real estate Land	<input type="checkbox"/> High <input type="checkbox"/> Moderate <input type="checkbox"/> Little <input type="checkbox"/> None	Moderately Spéculative

Recommandations

Goal 1. _____ Present Value ₹ _____ Value after ____ Years ₹ _____

Need to save ₹ _____ (Annually/Half-yearly/ Monthly/Quarterly/One Time)

Benefits _____

Goal 2. _____ Present Value ₹ _____ Value after ____ Years ₹ _____

Need to save ₹ _____ (Annually/Half-yearly/ Monthly/Quarterly/One Time)

Benefits _____

Goal 3. _____ Present Value ₹ _____ Value after ____ Years ₹ _____

Need to save ₹ _____ (Annually/Half-yearly/ Monthly/Quarterly/One Time)

Benefits _____

Suggested Meetings (Referrals)

1. _____ 2. _____

1. _____ 4. _____

Customer's signatures

Agent's signature

Date