

Financial planning

Contact Details:

• <u>Name:</u>
• <u>Date of Birth:</u>
• <u>Gender:</u> 1. Male <input type="checkbox"/> 2. Female <input type="checkbox"/>
• <u>Mobile :</u>
• <u>Email:</u>

Occupation, Education & Family Details:

• <u>Qualification:</u> 1. Undergraduate <input type="checkbox"/> 2. Graduate <input type="checkbox"/> 3. Post Graduate <input type="checkbox"/> 4. Professional <input type="checkbox"/> 5. Others <input type="checkbox"/>
• <u>Occupation:</u> 1. Housewife / Unemployed <input type="checkbox"/> 2. Pvt. Ltd. Co. employee <input type="checkbox"/> 3. Student <input type="checkbox"/> 4. Public Ltd. Co. employee / Govt. employee <input type="checkbox"/> 5. Business / Self-employed <input type="checkbox"/>
• <u>Employment Level:</u> 1. None / Others (No Fixed Income Source) <input type="checkbox"/> 2. Junior Level (executives, trainees, etc.) <input type="checkbox"/> 3. Middle Level (Managers, Asst. Managers etc.) <input type="checkbox"/> 4. Senior Level (Directors, CEO, Proprietor, Partner, Doctors, CAs, etc) <input type="checkbox"/>
• <u>Total Earning Member in Family:</u> 1. 1 <input type="checkbox"/> 2. More than 1 <input type="checkbox"/>
• <u>Total Dependant Members in Family:</u> 1. 0 <input type="checkbox"/> 2. 1-2 <input type="checkbox"/> 3. 3-4 <input type="checkbox"/> 4. More than 4 <input type="checkbox"/>

Final Few Questions:

• <u>Do you have your own home?</u> 1. Yes <input type="checkbox"/> 2. No <input type="checkbox"/>
• <u>How much do you save out of your annual earnings?</u> 1. Less than 10% <input type="checkbox"/> 2. 10% - 25% <input type="checkbox"/> 3. 25% - 50% <input type="checkbox"/> 4. More than 50% <input type="checkbox"/>
• <u>How much savings/assets have you accumulated so far?</u> 1. No assets <input type="checkbox"/> 2. Moderate asset level <input type="checkbox"/> 3. Satisfactory asset level <input type="checkbox"/> 4. High asset level <input type="checkbox"/>
• <u>What do you expect your assets to deliver?</u> 1. Regular income flow <input type="checkbox"/> 2. Appreciation/ Growth <input type="checkbox"/>
• <u>How do you make your investment decisions?</u> 1. Based on primary information only <input type="checkbox"/> 2. Only after thoroughly checking the primary info through other sources <input type="checkbox"/>
• <u>How do you define 'RISK' in a financial context?</u> 1. Opportunity to make more money <input type="checkbox"/> 2. Uncertainty <input type="checkbox"/> 3. Danger / Stay away <input type="checkbox"/>

Start planning for your Child's Education

Select the no. of children you wish to plan for: 1.One <input type="checkbox"/> 2.Two <input type="checkbox"/> 3.More than 2 <input type="checkbox"/>	
Child's Name: 1.	2.
& Age 3.	4.

• In how many years will you need money for this child's Education?	<input type="text"/> years
• What is your expected cost of Education (based on current value)?	<input type="text"/> Lacs
• What is your anticipated inflation rate?	<input type="text"/> %
• What are the annual returns you expect on your investment?	<input type="text"/> %
• How much money have you already saved or set aside for this child's Education?	<input type="text"/> Lacs

Start planning for your Child's Marriage

Select the no. of children you wish to plan for: 1.One <input type="checkbox"/> 2.Two <input type="checkbox"/> 3.More than 2 <input type="checkbox"/>	
Child's Name: 1.	2.
& Age 3.	4.

• In how many years will you need money for this child's Marriage?	<input type="text"/> years
• What is your expected cost of Marriage (based on current value)?	<input type="text"/> Lacs
• What is your anticipated inflation rate?	<input type="text"/> %
• What are the annual returns you expect on your investment?	<input type="text"/> %
• How much money have you already saved or set aside for this child's Marriage?	<input type="text"/> Lacs

Start planning for your Retirement

• At what age do you wish to retire?	<input type="text"/> years
• What is your Life expectancy?	<input type="text"/> years
• How much do you wish to earn each month after Retirement? (Current Value)	<input type="text"/> Rupees
• What is your anticipated inflation rate?	<input type="text"/> %
• What are the annual returns you expect on your investment before retirement?	<input type="text"/> %
• What are the annual returns you expect on your investment after retirement?	<input type="text"/> %
• How much money have you already saved for your Retirement?	<input type="text"/> Lacs

Start planning for building your Wealth

Select the Goal you wish to plan for? 1. Car 2.Home 3.Vacations
 4.Celebrations 5.Others

Goal starts in:

• Goal Title	<input type="text"/>
• In how many years do you plan to buy a Car?	<input type="text"/> years
• What is your expected cost of this Goal (based on current value)?	<input type="text"/> Lacs
• What is your anticipated inflation rate?	<input type="text"/> %
• What are the annual returns you expect on your investment?	<input type="text"/> %
• How much money have you already saved for this Goal?	<input type="text"/> Lacs