Initial Client Data Sheet

1. What is your full name.

2. What is the objective of utilizing our services. What do you plan to achieve in this exercise. What are your expectations.

3. How did you come to hear of us? Please be specific and mention names if any.

- Friend
- Website
- Twitter
- Linkedin
- Blog
- FPSB Board of registered Certified Financial Planners in India.
- Google Search(please mention what search option you typed in)
- Any other: please specify.

4. Where do you work. Please provide company name and address.

5. Where is your place of residence. Please provide address with phone numbers.

6. What is your official and personal email id

7. What is your Date of Birth.

8. How many people comprise your family. Please provide names and ages.

9. Who are your dependents.

10. What are your approximate earnings.(this information would need to be detailed in the Main Client Data Sheet)

11. Is your home self occupied.

12. Please specify in brief financial assets you hold, like mutual funds, shares, bonds, gold, art, insurance policies, PPF, FD, RD, NSC, RBI bonds and approximate valuation.

13. Please specify in brief the non financial assets you hold(like property) and their approximate value.

14. What is your risk appetite:- High / Medium / Low.

15. What percentage of your income are you currently saving.

16. Any comments you would like to make.

Thank you for your time.

Please note, this is the initial client data sheet and there would be a more detailed client data sheet, which would encompass your financial goals in detail.

Please note, this information will be kept confidential with us.
Thankyou Dilshad.