

Comprehensive Financial Planning

Private and Confidential

Fact Finder

Congratulations! For being among enlighten souls who realizes the importance & need for undergoing a complete Financial Planning for you & your family... You are just 1 step away of having your own Financial Plan.

What is Financial Planning(FP)? FP is the process of establishing personal & financial goals and creating a roadmap to reach them. The FP exercise is a must & most recommendable for any person at all times.

Your Personal Profile

Your Name																		
Date of Birth:		D	D	M	M	Y	Y	Y	Y	If you don't mind...			Gender:		Male	<input type="checkbox"/>	Female	<input type="checkbox"/>
Status:	Single	<input type="checkbox"/>	Married	<input type="checkbox"/>	Others	<input type="checkbox"/>	Contact Number											
Children	0	0	Educational Qualification			Email ID												
Address																		
City			State			Country												
Pin Code						Expected Retirement Age			in Years- Eg:58			Have You Prepared a Will?			Y/N			
Recommended Risk Profile			Conservative Portfolio			<input type="checkbox"/>	Balanced Portfolio			<input type="checkbox"/>	Aggressive Portfolio			<input type="checkbox"/>				
Equity	%	Debt	%	Cash	%	Occupational Details												
Designation																		

Family Members Details

Spouse Name																								
Gender:		Male	<input type="checkbox"/>	Female	<input type="checkbox"/>	Date of Birth:			D	D	M	M	Y	Y	Y	Y	Status:		Single	<input type="checkbox"/>	Married	<input type="checkbox"/>	Others	<input type="checkbox"/>
Educational Qualification			Relationship																					
Profession			Retirement Age																					
Net Monthly Income (Rs.)			<input type="checkbox"/>			I want to include spouse income for entire plan																		
Name																								
Gender:		Male	<input type="checkbox"/>	Female	<input type="checkbox"/>	Date of Birth:			D	D	M	M	Y	Y	Y	Y	Status:		Single	<input type="checkbox"/>	Married	<input type="checkbox"/>	Others	<input type="checkbox"/>
Educational Qualification			Relationship																					
Profession			Net Monthly Income (Rs.)																					
Name																								
Gender:		Male	<input type="checkbox"/>	Female	<input type="checkbox"/>	Date of Birth:			D	D	M	M	Y	Y	Y	Y	Status:		Single	<input type="checkbox"/>	Married	<input type="checkbox"/>	Others	<input type="checkbox"/>
Educational Qualification			Relationship																					
Profession			Net Monthly Income (Rs.)																					
Name																								
Gender:		Male	<input type="checkbox"/>	Female	<input type="checkbox"/>	Date of Birth:			D	D	M	M	Y	Y	Y	Y	Status:		Single	<input type="checkbox"/>	Married	<input type="checkbox"/>	Others	<input type="checkbox"/>
Educational Qualification			Relationship																					
Profession			Net Monthly Income (Rs.)																					
Name																								
Gender:		Male	<input type="checkbox"/>	Female	<input type="checkbox"/>	Date of Birth:			D	D	M	M	Y	Y	Y	Y	Status:		Single	<input type="checkbox"/>	Married	<input type="checkbox"/>	Others	<input type="checkbox"/>
Educational Qualification			Relationship																					
Profession			Net Monthly Income (Rs.)																					

Notes:

