

Need analysis checklist for Financial Advisor (Sample)

Date:

Officer:

1. Name

Age:

2. Address

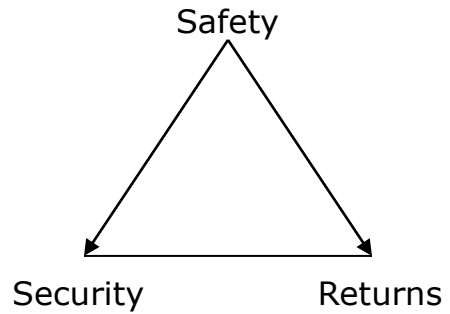
3. Telephone nos

(O)

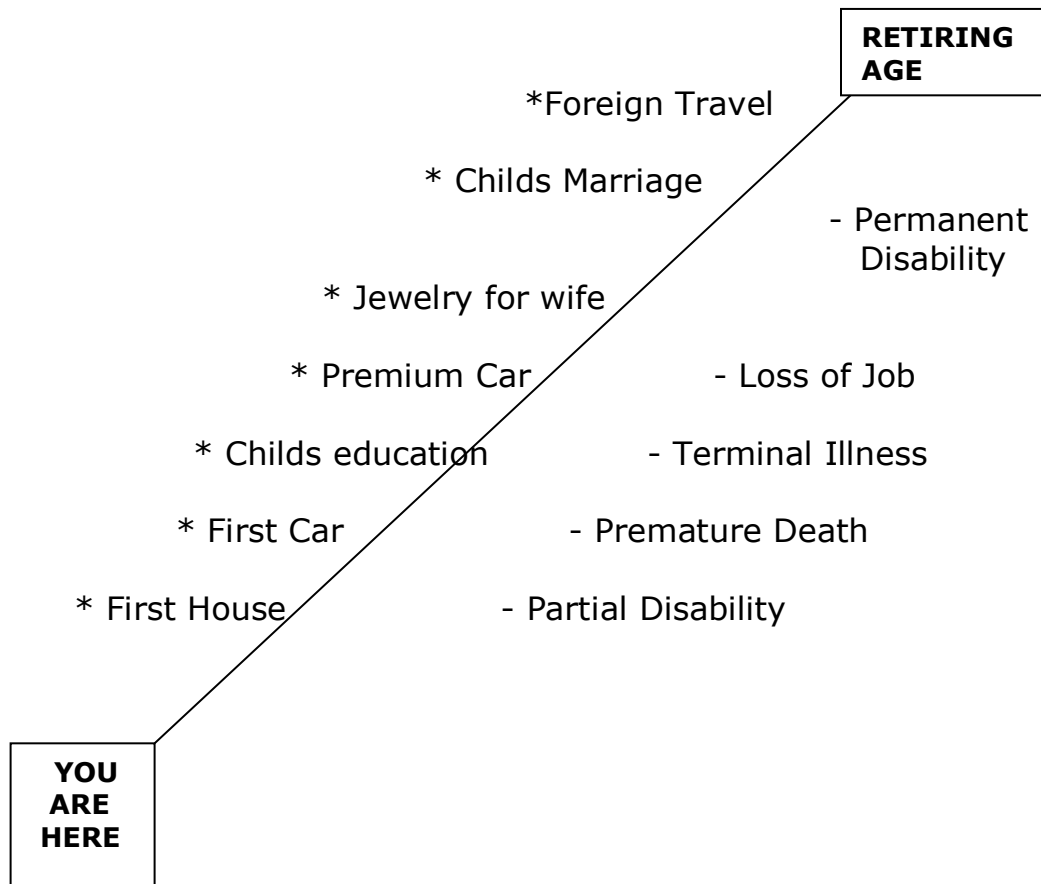
(R)

(M)

4.



5. The From – To Graph



6. Educate customers on necessary risk. (tick mark after finishing each point)

- a) Living too long
- b) Premature death or disability

7. Balance sheet of life:

Forced Saving/month

- 1. Insurance I
- 2. Insurance II
- 3. Insurance III
- 4. Insurance IV
- 5. Insurance V
- 6. PPF
- 7. Safety Bonds
- 8. Vikas Patra
- 9. Fixed Deposits
- 10. Small Savings
- 11. Mutual Funds I
- 12. Mutual Funds II
- 13. Mutual Funds III
- 14. Recurring Deposit
- 15. Others

Accepted liability/month

- 1. House Loan
- 2. Personal Loan
- 3. Car Loan
- 4. Other loan
- 5. Other loan
- 6. Dept loan
- 7. Society loan
- 8. Hand loan
- 9. Other
- 10. Other
- 11. Other

Total _____ (a) _____ (b)

(a) - (b) = (c) _____

if © is negative , then that is the amount of insurance premium that must be paid immediately.

8. Other members of the family (Age and insurance status)

- a) Spouse
 - b) Child 1
 - c) Child 2
 - d) Any other dependents
 - e) Parents staying with applicant
-