Need analysis checklist for Financial Advisor (Sample) Officer: Date: 1. Name Age: 2. Address Safety 3. Telephone nos (0) R (M) 4. Security Returns 5. The From – To Graph RETIRING AGE *Foreign Travel * Childs Marriage - Permanent Disability * Jewelry for wife * Premium Car - Loss of Job * Childs education - Terminal Illness * First Car - Premature Death * First House - Partial Disability YOU ARE HERE

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

Accepted liability/month

House Loan
Personal Loan

3. Car Loan

4. Other loan

5. Other loan

6. Dept loan

8. Hand loan

9. Other

10.Other

11. Other

7. Society loan

- 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

Total

(a)

(b)

(a) – (b) = (c) _____

if $\ensuremath{\mathbb{C}}$ 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