



GOAL FINDER SHEET

1. Mr _____ Date Of Birth _____ Married Yes/NO

2. Spouse Working _____ Number Of Kids _____

3. Job/Business _____ Designation _____

Age at retirement from active work: _____

S. No.	Goal	Time (Years)	Present Value ₹

Risk Management

Assets		Present Responsabilités	
Cash, FD, PPF, CD etc.		Outstanding Home/Car / Personal Loan	
MF, Shares, Débentures Etc.		Rental & Household Expense Équivalent	
Life Insu rance Sum Assured*		Emergency Fund	
Pension Fund			
Other Assets, Rental, Agri Income			
TOTAL Assets		TOTAL Responsabilités	
Gap between Assets & Responsabilités			

Details of Policies Taken Till Date	Policy #1	Policy #2	Policy #3	Policy #4	Other
Reason for taking out policy					
Policyholder (A, B, or Joint)					
Sum assured*					
Annual Premium					
Maturity Date					

Monthly Expenditures

Essential Expenditures ₹ _____ Other Expenditures ₹ _____ Total
₹ _____



Monthly Income

Salary/ Business Income ₹ _____ From other source (Rentals, Agri., Interests etc.) ₹ _____

Total Monthly Income ₹ _____

Disposable Monthly Income ₹ _____

Risk Attitude

Investment Type	Percentage Investment	Investment	Preference of this type	Risk Attitude
Safe Fixed Accounts/ Income	%	Endowment life insurance Bank accounts PO MIS/ RD Money market funds	<input type="checkbox"/> High <input type="checkbox"/> Moderate <input type="checkbox"/> Little <input type="checkbox"/> None	Guaranteed
Growth and Higher Income	%	Balanced mutual funds Variable life / annuities Growth mutual funds	<input type="checkbox"/> High <input type="checkbox"/> Moderate <input type="checkbox"/> Little <input type="checkbox"/> None	Moderately Secure
More Aggressive Growth	%	Stocks / equities Rentals Real estate Land	<input type="checkbox"/> High <input type="checkbox"/> Moderate <input type="checkbox"/> Little <input type="checkbox"/> None	Moderately Spéculative

Recommndations

Goal 1. _____ Present Value ₹ _____ Value after ____ Years ₹ _____

Need to save ₹ _____ (Annually/Half-yearly/ Monthly/Quarterly/One Time)

Benefits _____

Goal 2. _____ Present Value ₹ _____ Value after ____ Years ₹ _____

Need to save ₹ _____ (Annually/Half-yearly/ Monthly/Quarterly/One Time)

Benefits _____

Goal 3. _____ Present Value ₹ _____ Value after ____ Years ₹ _____

Need to save ₹ _____ (Annually/Half-yearly/ Monthly/Quarterly/One Time)

Benefits _____

Suggested Meetings (Referrals)

1. _____ 2. _____

1. _____ 4. _____

Customer's signatures

Agent's signature

Date