

Client Profiling Form (Individual/Family)



Product Preference

Mutual Fund Equity
 Mutual Fund Debt
 Mutual Fund SIP
 Corporate Bond
 PMS*

FD
 Demate & Trading
 Insurance
 Realty
 AIF*

Other _____

*PMS = Portfolio Management Services *AIF = Alternative Investment Funds

Client Insight

Occupation*
 Service
 Business
 Retired
 Housewife
 Others (Please Specify)

If in service
 Private Ltd
 MNC
 Govt.
 Public Ltd
 Others (Please Specify)

Company / Organisation	Designation
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If in business
 Sole Proprietorship
 Partnership
 Private Ltd.
 Public Ltd.

Others (Please Specify)

Annual Income
 Below Rs. 5 Lacs
 Rs. 5 – Rs. 10 Lacs
 Rs. 10 – Rs. 25 Lacs
 Rs. 25 Lacs & Above

Net Worth

Exiting Life Insurance Cover (Rs.)

Exiting Health Insurance Cover (Rs.)

Home Ownership
 Owned by Self/Spouse
 Rented
 Paying Guest
 Company Provided

Risk Category
 Aggressive
 Moderate
 Conservative
 (You can use Risk Profiling Questionnaire to derive this)

Signature of Principal Decision Maker