

GOAL FINDER



"The secret of financial success is to spend what you have left after saving, instead of saving what is left after spending."

I. Personal Information: (To be filled in by the Prospect)

Name: _____
 Age: _____
 Address: _____
 Tel Number: (R) _____ (O) _____ (M) _____
 E-Mail ID: _____

My Family Members and Dependent Details		
Name	Relationship	Age
1.		
2.		
3.		
4.		

Goals that I always wanted to protect!

Money, when available at the right time and in the right quantity, is what is needed for achieving financial goals. In an endeavour to bring you closer to attaining your financial goals, we at AmSure* would like to help you identify, plan and invest in your financial priorities.

II. My financial priorities : (in order of preference)		
<input type="checkbox"/>	Financial protection for family	_____ > Life Insurance Cover
<input type="checkbox"/>	Children Education / Marriage	_____ > Savings & Wealth Creation
<input type="checkbox"/>	Independent retirement	_____ > Retirement benefits

III. Planning

► Financial Protection for family: Your ideal Life Insurance Cover

Capital fund rule

Insurance cover needed = (Your total annual expenses*100)/Current Bank Rate = Total Corpus needed (₹)

For Example:

Total Annual Expense = 5 Lacs, Current Bank Rate = 10%

Total Corpus needed = (500000*100)/10 = ₹ 50,00,000

MY NEED SUMMARY					
Financial need	Amount needed today (₹)	Amount already arranged (₹)	Gap (₹) (A – B = Gap)	By When (Years/Time in hand)	Balance (₹) (Adjusted for inflation)
Example: Education	10 Lacs	2 Lacs	8 Lacs	15 Years	8 Lacs*2.07= 16.56 Lacs
Financial protection for family				Immediate	NA
Child's education & marriage					
Independent retirement					

Promise of Confidentiality: All information that you provide will be treated with strictest confidence and will not be shared outside of AmSure.

Years after which money is needed	Inflation Rate	
	5%	8%
Year 5	1.27	1.48
Year 10	1.62	2.15
Year 15	2.07	3.17
Year 20	2.65	4.6
Year 25	3.38	6.84

How soon should we start investing? Investment made of ₹ 50000 p.a. @ 8% return		
If you start today, you accumulate	₹ 7.24 Lacs	In 10 years
If you start after 3 years, you accumulate	₹ 4.46 Lacs	In 7 years
If you start after 5 years, you accumulate	₹ 2.93 Lacs	In 5 years

Considering the above requirements, what is the amount of money that you are willing to commit today towards the achievement of your financial priority?

₹ 25000
 ₹ 50000
 ₹1 Lac
 ₹ > 1 Lac
 Other amount: _____

IV. Recommended Solution/s (Please Tick):

Life Insurance with Insurance Cover
 Life Insurance with Retirement Cover
 Life insurance with Endowment Cover

I have gained from this exercise and would like to recommend that you carry it out for my following relatives and friends

Name	Phone Number	Address
1.		
2.		
3.		

Customer Signature: _____ **AIP Name:** _____
AIP Code No.: _____ **AIP Signature:** _____

DISCLAIMERS:

1. This is a voluntary and optional survey for the purposes of collecting accurate customer information and providing better services to present and prospective customers. 2. The resultant outcome of the survey is based on defined statistical parameters which are co-dependant on the responses received in the questionnaire/survey. Any error or omission is regretted and does not create any liability or obligation either on AmSure or on MNYL. 3. This report only serves as a guiding tool and the customer is advised to exercise his wisdom in taking decisions which are best suited to his future. AmSure by collecting information in this survey form in no way attempts, entices or induces the customer to invest his/her money or other resources in MNYL's products, stock market or any other investment option. 4. The information provided by the Customer shall be endeavored to be kept confidential.