



VS Financial Advisors

~~~Lasting Values, Binding Relationships~~~

S.Babu Arunachalam o 40970584 , 93419 19417 o vsfinancialadvisors@gmail.com  
Flat 203, Shivaprakruthi Apts, Talacauvery Layout, Amruthahalli, Bangalore 560092

MUTUAL FUNDS LIFE INSURANCE GENERAL INSURANCE Co.FIXED DEPOSITS BONDS

## CLIENT DATA SHEET

1. What are your current investments- in PF(accumulated amount and current employer and employee contribution), PPF, Mutual funds, stocks, property, superannuation other movable assets.
  
2. What is your risk appetite (1-High Risk 2-Medium Risk 3- Low Risk)
  
3. What is your net take home income after taxes.
  
4. Who are your dependents- wife children, parents.(Please specify, Name, gender and age of each dependent.)
  
5. What is your Date of Birth.
  
6. Retirement planning-
  - a. What are your current monthly expenses excluding loans.(food, personal and entertainment, household, transport, medical, education).
  
  - b. When would you like to start receiving a monthly inflow to provide for your living expenses?
  
7. Do you have children- If so, please specify, name, gender and age of each child.
  
8. Have you provided for Child education planning- If not or not adequate, what is the amount you envisage they would need when they are 17 yrs old.



# VS Financial Advisors

~~~Lasting Values, Binding Relationships~~~

S.Babu Arunachalam o 40970584 , 93419 19417 o vsfinancialadvisors@gmail.com
Flat 203, Shivaprakruthi Apts, Talacauvery Layout, Amruthahalli, Bangalore 560092

MUTUAL FUNDS LIFE INSURANCE GENERAL INSURANCE Co.FIXED DEPOSITS BONDS

9. How often do you go on a holiday? What is the likely expenditure on each trip.(Pl specify separately for domestic and foreign travel.)
10. What are your current commitments in terms of loans or liabilities. (Please specify the EMI amount-home loan/car loan/personal loan/ Insurance payments/ other).
11. What percentage of your annual take home, would you like to allocate towards savings.(Disposable income per annum)
12. Have you provided for Life Insurance and medical Insurance?
 - a. What is the amount of life coverage and what are the premium commitments.
 - b. What is the medical coverage and what are the premium commitments

Pl do help with details as accurately as possible, since this would provide us with a better understanding of you and enable us to provide you with solutions based on your needs and current financial position.

Thank you for your time.

VSFA Mission Statement

Our Endeavour is to update the investors about various investment and insurance options that are available from time to time and provide efficient after sales service. We sincerely try to help our clients take informed decisions about their investments and insurance.

DISCLAIMER

Mutual funds, like securities investments, are subject to market risks and there is no guarantee against loss in the schemes or that the schemes' objectives will be achieved. As with any investment in securities, the NAV of the Units issued under the schemes can go up or down depending on various factors and forces affecting capital markets. Past performance of the Sponsor or mutual funds managed by the Sponsor does not indicate the future performance of the schemes of Mutual Fund. Please read the offer document of the schemes before investing. Any investment program in securities may be volatile and can involve the loss of principal. No assurances can be given as to the accuracy of market predictions. Information made available here is purely as a measure of facilitation. While every effort has been made to ensure that the information given is correct, the author does not hold himself liable for any consequences, legal or otherwise, arising out of use of any such information. In view of the individual nature of the product features, tax consequences, etc., you are advised to have detailed professional consultation before taking any decision for action on the basis of information provided here. If you are not the intended recipient, please contact the sender by email and delete all copies. Your cooperation in this regard is appreciated. Before opening any attachments please check them for viruses and defects. Insurance is the subject matter of the solicitation.



VS Financial Advisors

~~~Lasting Values, Binding Relationships~~~

S.Babu Arunachalam ◦ 40970584 , 93419 19417 ◦ vsfinancialadvisors@gmail.com  
Flat 203, Shivaprakruthi Apts, Talacauvery Layout, Amruthahalli, Bangalore 560092

MUTUAL FUNDS

LIFE INSURANCE

GENERAL INSURANCE

Co.FIXED DEPOSITS

BONDS