



Data Collection Sheet

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Personal Details	Investment Objective: To achieve long term capital appreciation by investing in diversified portfolio predominantly consisting of equity, equity related securities and multi-cap companies. However, there can be no assurance that the investment objection of the scheme will be achieved. HIGH RISK

Particulars	Husband	Wife
Name		
Work Details		
Designation		
Company		
Health History		
Date of Birth (dd/mm/yyyy)		
Current Age		
Mobile No.		
Email ID		
Communication Address		
Retirement Age		
Life Expectancy		

Family Details

Particulars	Child -1	Child -2	Father	Mother
Name				
Current Status				
Health History				
Financially Dependent				
Date of Birth (dd/mm/yyyy)				
Current Age				

Major Goals

Children's Future				
Child -1 Name				
Goal	Graduation	Post-Graduation	Marriage	Others
Goal Age				
Current Value				
Or Give a Value Range				
Priority (H/M/L)				

Major Goals

Children's Future				
Child -2 Name				
Goal	Graduation	Post-Graduation	Marriage	Others
Goal Age				
Current Value				
Or Give a Value Range				
Priority (H/M/L)				

Other Goals

Goal	Yes/No	Timeframe	Amount	Priority (H/M/L)
Zakat				
Haj				
House Purchase				
Home Renovation				
Corpus for Start-up				
Big Purchases				
Holiday				
Estate for Children				
Others				

Inflows

Annual Incomes	0	0	Priority (H/M/L)
Salary Income (Take Home)			
Performance Bonus (Net of TDS)			
Re-imbursments			
Business Income (Net Profit)			
Rental Income			
Investment Income			
Total Income			
Expected Income in Income (%)			

Employment Benefits

Benefits	0	0
EPF		
Superannuation		
Gratuity		
Group Insurance		
Working since (in years)		

Outflows

Particulars	Monthly	Annual	% of Income
Household Expenses			

Credits: NetworkFP

Food & Grocery			
House Rent / Maintenance / Repair			
Conveyance, Fuel & Maintenance			
Medicines / Doctor / Healthcare			
Electricity / Water / Maid			
Mobile / Telephone / Internet			
Lifestyle Expenses			
Clothes / Accessories			
Shopping / Gifts			
Dining / Movies			
Personal Care / Others			
Travel & Annual Vacation			
Dependent Expenses			
Children's Schooling / College Expenses			
Contribution to Parents / Siblings			
Pure Insurance Premiums			
Life Insurance			
Mediclaime			
Motor Insurance			
Loan Servicing			
Home Loan EMI			
Vehicle Loan EMI			
Personal Loan EMI			
Net Outflows			
Savings (Inflows-Outflows)			
PPF			
ULIP			
Mutual Fund SIPs			
Chit Funds			
Regular Monthly Investments			
Surplus (Savings – Investments)			
Economic Inflation			7%

Assets

Particulars	0	0	Joint / Others
Personal Assets			
Residential Property			
Jewelry			
Inheritance of Wealth Expected			

Credits: NetworkFP

Others			
Other Assets			
Savings Bank / Cash in Hand			
Fixed Deposit			
PPF / EPF/Superannuation / Gratuity			
ULIPs			
Direct Equity			
Mutual Funds			
Physical Assets			
Gold / Silver (Bars / Coins)			
Real Estate Investment			
Total Investment Assets			

Liabilities

Particulars	Outstanding Balance	Balance Term	Interest Rate	EMI
Home Loan				
Vehicle Loan				
Personal Loan				
Other Loans				

Declaration

I understand that the Goal Plan prepared, and the recommendations provided in the plan will only be as accurate as the data and information provided by me at the meeting.

I declare that I do not want to disclose all my personal data and I have approached SenSage only for a long-term investment growth objective and I understand the risks of not doing a financial plan / goal -plan.

Client Signature: _____

Place: _____

Client Name: _____

Date: _____