

Name : \_\_\_\_\_ Age : \_\_\_\_\_

Company : \_\_\_\_\_ Designation : \_\_\_\_\_

Email 电邮 : \_\_\_\_\_ Tel No : \_\_\_\_\_

Marital Status : Single / Married / Divorce Dependents : \_\_\_\_\_

**1. Please Highlight 3 Most Concern Matters:-**

- \_\_\_ **Wealth Accumulation** via Savings / Investment  
 \_\_\_ **Medical Coverage** for me & my family  
 \_\_\_ **Education Funds** for my children  
 \_\_\_ Sufficient Funds for **Comfortable Retirement**  
 \_\_\_ **Estate Planning** Solution for Wealth Distribution  
 \_\_\_ **Financial Protection** upon Death & Disability  
 \_\_\_ **Debt Cancellation & Loan Restructuring**

**2. Risk Management:**

Existing Coverage	Sum Insured	Companies	Remark
Critical Illness			
Hospital & Surgical			
Personal Life			
Personal Accident			

Monthly Family Income Needs : RM \_\_\_\_\_

**3. My Concern on Housing Loan :**

- a. Exiting Mortgage Loan  Fixed Rate  BLR Basis  
 b. I have Mortgage Insurance  Yes  No

Have you arranged Asset protection Account for your property?

If No, Why? \_\_\_\_\_

**4. My current investment portfolio consists of:-**

- Fixed deposit  Shares  Properties  
 Endowment  Unit Trust  Others \_\_\_\_\_

Will you be investing within 12 months?

Which portfolio ? \_\_\_\_\_

**5. Personal Risk Profiling :**

- Conservative  Moderate  Aggressive  Not Sure

**6. Recommendation :** I will recommend this Financial Health Scan to my friends

No	Name	Contact	Remark
1			
2			
3			

Associate : \_\_\_\_\_

Next Appointment Date : \_\_\_\_\_