

Date: _____

Name 姓名 : _____

Age 年龄 : _____

Company 公司 : _____

Designation 职位 : _____

Email 电邮 : _____

Tel No 电话号码 : _____

Marital Status 婚姻状况: Single 未婚 / Married 已婚 / Divorce 离婚

Dependents 孩子人数: _____

1. Income Resources 主要收入来源

How many % of your total income is consist of Active income?

请问您是主动收入占了全体收入的几%?

 90% - 100% 50% - 80% 20% - 40% Others _____**2. Reserved Funds 筹备金**

If temporary can't work due to unfortunate things happen, do you have enough reserves to maintain your family needs?

如果因不幸而暂时不能工作, 您是否拥有足够的资源来维持家庭生活费?

 Yes 有 No 没有 Not sure 不知道

What's your solution 您的方案是? _____

How much roughly do you need to sustain your family needs in a month? Need to sustain for how long?

请问您的每月家庭生活费需要多少? 需要维持多少年?

3. Family Dependency 家人的依赖性

Can your family survive without your income? 在完全失去您的收入之下, 您的家人可否继续生活下去?

 Yes 会 No 不会 Not sure 不知道

Why 为什么? _____

4. Income Protection 收入保障

Have you protected your income? 你有做好收入保障计划吗?

 Yes 有 No 没有 Not sure 不知道

Why 为什么? _____

5. Others Responsibilities and Obligation 其他责任与负担

Besides the family lincome protection, what other outstanding financial commitment do you have?

除了家庭收入保障, 您是否还有其他未解决的负担或责任?

 Mortgage Loan 房屋贷款 PTPTN 教育贷款
 Hire Purchase Loan 汽车贷款 Credit Card 信用卡
 Personal Loan 个人贷款 Income Tax 所得税
 Others 其他 _____