



Financing Interview

Date: _____

Candidate Background

Name:	Recruited by:
-------	---------------

Kindly tick (✓) whichever appropriate:

- | | | |
|--|--|--|
| <input type="checkbox"/> Financial based | <input type="checkbox"/> Non-Financial based | |
| <input type="checkbox"/> Bank Relationship Manager | <input type="checkbox"/> Insurance Agent | <input type="checkbox"/> Unit Trust Consultant |
| <input type="checkbox"/> Others _____ | | |

No	Questionnaires	Remark
1	To analyze both Character Test Result and Career Suitability Test Result <i>(preferred with character "S and I" because S is Steadiness and executor; I is Influential and want to have recognition)</i>	
2	What is your Mission in Life? (What kind of things that you can't let go in your life?) Why? <i>(to check if his mission is aligned or close with ours)</i>	
3	What's your plan in pursuing this career? What do you want to achieve in the next 3 to 5 years? Why? How do you want to go about it? <i>(to check if he really want to build team, future leader with proper planning?)</i>	
4	Impromptu Test <i>(to check whether he is a versatile person and able to handle crisis spontaneously)</i>	
5	What's your perception towards Unit Trust, Takaful Life Insurance and Loan in Financial Planning? How do you see the potential of Financial Planning? Would you able to handle these concurrently? <i>(Double check on his financial commitment, debt and outstanding financial burden if any. To understand his view in Financial Planning or only stick to Loan itself)</i>	

Is the candidate qualified for TES/AFS? Would you recommend? Yes No

Interviewed by _____

In the presence of _____

Board Member's Name

Management Member's Name