

The 17 most important questions to be fill by every customer.

1.How many members are there in your family?

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2.What are their name and ages?

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3.What is your total monthly income?

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4.What is your total monthly expenditure?

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5.Where do you save money ?

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6.If you stay out station for the whole month, then what shall be the family`s expenditure?

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7.What kind of insurance polices do you have?

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8.Do you have any additional source of income?

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9.Do you have any properties?

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10.Any loan pending on your properties?

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11.Do you have any liabilities ?

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12.What shall be your income 5 year later ?

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13.What shall be your expenditure 5 year later ?

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14.What shall be your income 10 year later ?

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15.What shall be your expenditure 10 year later ?

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16.What are your plan for your children`s future ? Aspiration ?

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17.What are your plans for your retired life ?

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