

TULLIS & ASSOCIATES

FSP 8264

WALTER TULLIS & ASSOCIATES CC

1996/037234/07

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FINANCIAL NEED ANALYSIS & INFORMATION SHEET

QUALIFICATION:

	Name	Date of birth	NO MATRIC	MATRIC	DIPLOMA	DEGREE
Life assured	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Marriage type	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

OCCUPATION:

ALLOCATION:	<input type="text"/>	ADMIN	SUPERVISOR	TRAVEL	MANUAL
		%	%	%	%

SALARY (GROSS): Spouse R Insured R

SALARY (TAXABLE): Spouse R Insured R

SMOKER: YES NO

ASSETS, LIABILITIES, INCOME & EXPENSES

Description (Disposable <input type="checkbox"/>)	Market Value	Outstanding Debt	Monthly Income	Installment
<input type="checkbox"/> R	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> R	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> R	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> R	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> R	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> R	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

WILL REQUIRED: YES NO

BENEFICIARIES

Name	d.o.b	requirements
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

COST

	Priority cover / premium	Requested Premium	Maximum Premium
Risk policy	<input type="text"/>	<input type="text"/>	<input type="text"/>
Investment	<input type="text"/>	<input type="text"/>	<input type="text"/>
Retirement Annuity	<input type="text"/>	<input type="text"/>	<input type="text"/>

initial

CURRENT PRODUCT EXPERIENCE

Risk Products	
Investment Products	
Retirement Annuities	
Annuity Income	

CLIENTS ASSESSMENT OF THEIR RISK PROFILE

Aggressive	
Moderate	
Conservative	
Adverse (Guarantees)	

CLIENT'S INITIAL ASSESSMENT OF THEIR REQUIREMENTS - ESTATE PLANNING

Amount required on death for dependants Income Capital

Income option percentage of current income % Gross R

Annual escalation percentage % CPI

Capital option Gross R

CLIENT'S INITIAL ASSESSMENT OF THEIR REQUIREMENTS - INCOME REPLACEMENT

Amount required on permanent disability Income Capital

Require temporary disability - waiting period 7days 1 / 3 / 6 months

Income option percentage of current income (max 75%) % Gross R

Annual escalation percentage % CPI

Capital option Gross R

CLIENT'S INITIAL ASSESSMENT OF THEIR REQUIREMENTS - CRITICAL ILLNESS

Amount required on specific illnesses Capital

Capital option Gross R

CLIENT'S INITIAL ASSESSMENT OF THEIR REQUIREMENTS - RETIREMENT

Years to retirement Age Term years

Amount required on retirement Income Capital

Income option percentage of current income % Gross R

Annual escalation percentage % CPI

Capital option Gross R

Personal preference single life annuity

 joint life annuity

 capital protector (single life annuity with matching life cover)

living annuity (invest in various fund and draw a fixed percentage of the capital) draw at _____ %

CLIENT'S INITIAL ASSESSMENT OF THEIR REQUIREMENTS - RETIREMENT

Requirement amount R term

 initial

Member: W.T. Tullis

Bachelor of Commerce (Economics)

Certified Financial Planner

Fellow of the Institute of Life and Pension Advisers

Diploma in Insurance

Associate of the Insurance Institute of South Africa
