**GENERAL CLIENT’S NEEDS ANALYSIS**

**I, the undersigned**: **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**I.D: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Request advice on the following:

Short-term insurance – Smit & Kie (Pty) Ltd FSP 11184

1. Household insurance
2. Commercial insurance
3. Farm insurance
4. Plant all risk
5. Other type of insurance

Long-term insurance – **Smit Adviseurs**CC FSP 44595

1. Life insurance
2. Disability insurance
3. Estate planning
4. Investments
5. Retirement planning
6. Medical aid
7. Testaments
8. Other

I/We acknowledge that sound and proper financial advice can only be provided after full disclosure of relevant information relating to appropriate personal, including private, information for the purposes of determining and advising on my/our financial situation and financial product experience and objectives.

Such information is furthermore required to determine my/our financial situation, financial product experience and financial needs and objectives. As well as acquire, maintain and service any financial products or to render related intermediary services.

I provided the service provider with limited information



I have provided all necessary, required information



**Representative signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Client signature:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**