**GENERAL CLIENTS 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 types 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 aids
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.

Such information may include any information relating to long-term insurance, short-term insurance, collective investment schemes, pension funds or any other financial product or service.

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

**Client signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**