**KLIËNTE ADVIES REKORD**

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| NAAM VAN KLIËNT: | | DATUM VAN INTERAKSIE:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | |
| WAS DAAR ‘N OMVATTENDE FINANSIELE DIENSTE ANALISE VOLTOOI? | | JA | NEE |
| WAS DAAR ‘N RISIKO ANALISE VOLTOOI? | | JA | NEE |
| VERSKILLENDE FINANSIELE PRODUKTE OORWEEG: | KWOTASIES GESIEN | JA | NEE |
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| BEHOEFTES / ITEMS WAT BESPREEK WAS EN AKSIES OM TE NEEM: | | | |
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| VOORGESTELLINGS VAN PRODUKTE, TOEKOMSTIGE PLANNE EN PRIORITEITE | | | |
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| OPENBAARMAKINGS SKRYWE WAS OORHANDIG | | JA | NEE |

DIE ADVIES IS GEBASEER OP DIE KORREKTE INFORMASIE VOORSIEN DEUR DIE DERDE PARTY ASOOK DIE KLIëNT.

MAKELAAR HANDTEKENING: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

KLIENT HANDTEKENING: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_