**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.

Kliënt handtekening: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Datum: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Makelaar handtekening:                             Datum: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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| Ashburton |  | Medihelp |  |
| Bestmed |  | Medshield |  |
| Bonitas  |  | Momentum  |  |
| Brightrock |  | Old Mutual |  |
| Discovery |  | Profmed |  |
| Fedhealth |  | Sanlam  |  |
| FMI |  | Sirago |  |
| Hollard |  | Stratum |  |
| Liberty |  |  |  |
| Medgap |  |  |  |