



Dream Log

BASIC

SHUBHCHINTAK
Creating happy families.

We'll start off with a little bit about you.

What's your name?

First Name Middle Name Last Name

When is your birthday?

DD / MM / YYYY

What do you do?

Salaried / Employed Self Employed Professional Business Student Retired Housewife
Other

What is your marital status?

Married Single Other

How can we stay in touch?

Mobile No.:

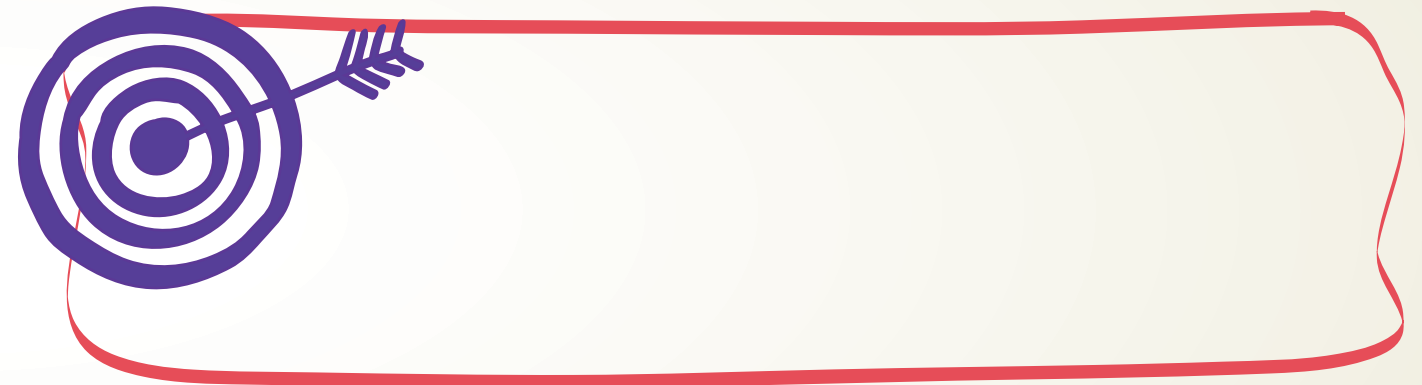
Email ID:



Let's dig a little deeper.

If you had to describe one life goal, that was more important to you than any other. What would it be?

Create something that symbolises this goal, and stick it here. It could be anything, from a photograph of your child to the keys to your dream car - as long as you can see it here.



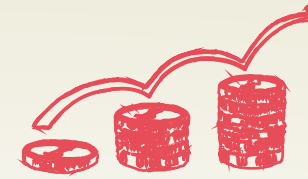
It's hard to limit yourself to one, right? Go ahead and describe a few of the other ones too.

Life goal no.	Description	When should it happen? (Year)	How much will it cost, today? (₹)
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Note: If you are articulating goals like property / car which might involve loan, please mention only down payment.

Help us understand the whole picture.



Let's not ignore reality.

What is the approximate value of the investments / assets you currently hold?

Name of the asset Amount (in Rs.)

- Property (don't include your primary house)
- Fixed Deposit
- Gold
- Stocks
- Mutual Fund
- Others



What are your regular monthly investments (in Rs.)?

As a risk-taker, would your best friend say you are: conservative, moderate or aggressive?

How much is your average monthly expenditure?

You could tell us the exact amount Or choose the appropriate bracket:

Less than 25,000 25,000 to 50,000 50,000 to 75,000 75,000 to 1,00,000 More than 1,00,000

How much is your annual household income (after tax)?

You could tell us the exact amount Or choose the appropriate bracket:

Less than 3L 3L to 6L 6L to 10L 10L to 15L 15L to 20L More than 20L

How much EMI do you pay monthly against the loans you have taken (in Rs.)?

Do you plan to take any more loans in the future? Yes No

It is important to keep the security of your loved ones in mind as well, when planning. Do you have your will in place?

Yes No

How many months will you be able to manage for without an income?

1-3 3-6 6-9 9-12 More than 12

Do you have any life insurance policies? Yes No

If yes, how much is the cover?

Do you have a health insurance policy? Yes No

If yes, how much is the cover?

Do you have a critical illness policy? Yes No

If yes, how much is the cover?

Do you have accidental disability insurance? Yes No

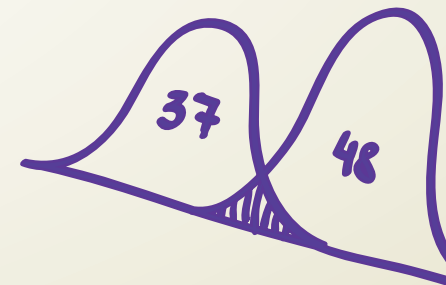
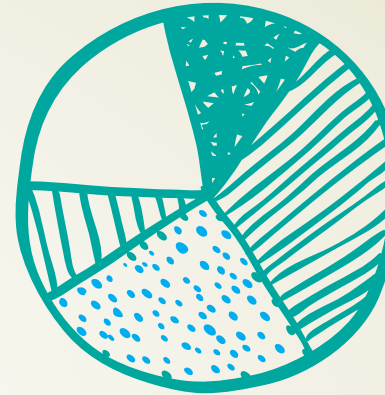
If yes, how much is the cover?

Are all of your assets insured for risks such as a fire, an earthquake, theft, etc?

Yes No

Is your family aware of all the assets you own and the loans you have to pay?

Yes No



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5. The services being facilitated under this initiative are incidental to its business as an Asset Management Company, under the SEBI (Mutual Funds) Regulations, 1996.
6. FIPL is authorised to share this information with the relevant distributor(s) / adviser(s), who refers the client to undertake this activity.
7. Any customer desiring to avail any other services offered by FIPL, needs to separately enter into arrangements with FIPL, to avail its services.
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13. The recommended investment amounts and investment avenues are derived using established theories on risk and return, after considering various aspects including but not limited to the nature of the scheme (such as its investment style and positioning) and the inputs provided by the customer about his goals and returns expectations. It may please be noted that the recommendations may not take into consideration all the material aspects relevant to investor's investment decisions. It is clarified that recommendations are not binding on the customers.
14. The recommendations are based solely on the inputs provided by the investor in the questionnaire. Axis AMC / Axis Mutual Fund is not responsible for the accuracy and validity of the information provided by investor.
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16. Investments in the Schemes of Axis Mutual Fund shall be subject to the terms and conditions of the statement of additional information and Scheme Information Document(s) of the relevant scheme(s) of Axis Mutual Fund.
17. By providing contact details the customer provides consent to be contacted to obtain further information by Axis AMC / Axis Mutual Fund, a duly authorised service provider of Axis Mutual Fund / Axis AMC, FIPL etc. over phone or e-mail.
18. Customer provides the necessary consent that Axis AMC / Axis Mutual Fund / FIPL / distributors and advisors may:
 - Contact by phone, letter, e-mail or other electronic means in relation to investment planning and other services that may be offered
 - Hold and use the information on computer file, in any other dematerialised form or in written hard copy and may use or pass the information to third parties for administration, regulatory, customer care and service purposes
 - Use the information and details pertaining to the customer to carry out statistical analysis and market research
19. Setting up the goals, planning of investment and taking informed investment decision might require professional expert advice. Customers are advised to consult their advisers prior to arriving at any investment decision. There is no assurance or guarantee that the goals planned for will be achieved and the same is subject to the investment performance of the schemes. Past performance of the schemes is neither an indicator nor a guarantee of future performance, and may not be considered as the basis for future investment decisions. The recommendations / plans provided shall be based on the inputs / details provided by customer.
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21. The customer agrees to not hold Axis AMC liable for any consequences in case of any of the particulars / information being false, incorrect or incomplete and undertakes to promptly inform of any changes to the information provided hereinabove and agrees and accepts that Axis AMC / Axis Mutual Funds, their authorised agents, representatives, distributors, services providers including FIPL (the Authorised Parties) are not liable or responsible for any losses, costs, damages arising out of any actions undertaken or activities performed by him / her / it on the basis of plans / information provided by it.
22. The customer authorises disclosure, sharing, remit of information / details in any form, mode or manner to service providers and agrees to provide any additional information / documentation that may be required in connection with this initiative.
23. Investors are requested to consult tax professionals for specific tax, legal and financial implications of the investment / participation / disinvestment in the schemes. The investments made by the schemes are subject to external risks.