

ANNEXURE

SCHEDULE**A) Personal Information:**

1. Name:

2. Address:

3. Contact No.:

4. Email Id:

5. Gender:

i.	Male		ii.	Female	
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6. Marital Status:

i.	Married		ii.	Unmarried	
iii.	Divorced		iv.	Widow	

7. Number of Dependents:

i.	One		ii.	Two	
iii.	Three		iv.	More than Three	

8. Religion: _____ Cast: _____.

9. Educational Qualification:

i.	Illiterate		ii.	Intermediate	
iii.	Non-Formal School		iv.	Up to SSC	
v.	Up to HSC		vi.	Diploma	
vii.	Graduate a. Traditional		viii.	Post-Graduate	
	b. Professional		ix.	Professional/Higher Education	

10. Occupation:

i.	Professional		ii.	Salaried Employee	
iii.	Housewife		iv.	Farmer	
v.	Retired		vi.	Student	
vii.	Business with 0-10 Employees		viii.	Business with 10-20 Employees	
ix.	Business with more than 20 Employees		x.	Skilled Labour	
xi.	Unskilled Labour		xi.	Self-Employed	

11. Earning Capacity (No. of earning Adults in Family):

i.	One		ii.	Two	
iii.	Three		iv.	Four	
v.	Five		vi.	Above Five	

12. Monthly Income:

I HH**I HH**

i.	Up to Rs. 10000			ii.	Rs. 10001 - Rs. 20000		
iii.	Rs. 20001 - Rs. 30000			iv.	Rs. 30001 - Rs. 40000		
v.	Rs. 40001 - Rs. 50000			vi.	Above Rs. 50001		

(I: Individual's Income. HH: Household Income.)

13. Monthly Household Expenses: Rs. _____.

14. Monthly Disposable Income: Rs. _____.

15. Which stage of life cycle you belongs from: **(Mention the age)****Age**

Stage I	Young Unmarried Stage	
Stage II	Young Married Stage	
Stage III	Young Married with Children Stage	
Stage IV	Married with Older Children Stage	
Stage V	Pre-Retirement Stage	
Stage VI	Retirement Stage	

B) Related to Investment:

1. Do you invest your disposable income?

i. Yes

ii. No

2. How much % of your income do you invest yearly?

i.	0 - 20%		ii.	20% - 30%	
iii.	30% - 40%		iv.	40% - 50%	
v.	50% & above				

3. What is the amount of your investment?

M Y**M Y**

i.	Upto Rs. 25000			ii.	Rs. 25001 - Rs. 50000		
iii.	Rs.50001 - Rs.100000			iv.	Rs.100001 - Rs. 150000		
v.	Rs. 150001 - Rs.200000			vi.	Above Rs.200001		

(M: Monthly Investment.**Y: Yearly Investment)**

4. Do you have an savings & investment amount target for each year?

if yes, Pleases mention the amount, Rs. _____

5. Do you take advice for your investments?

i. Yes

ii. No

if yes, whom do you consult?(Give Rank)

i.	Financial Consultant		ii.	Family Members	
iii.	Agents		iv.	Sales Executives	
v.	Relatives		vi.	Friends	

6. Do you invest your money for tax planning?

i. Yes

ii. No

if yes, to whom do you consult? (Give Rank)

i.	Tax Consultant		ii.	Family Members	
iii.	C.A.		iv.	Sales Executives	
v.	Agents		vi.	Friends	
vii.	Brokers		ix.	Others	

7. Your Awareness & Preference regarding various Investment Avenues, also mention the amount of investment in various Investment Avenues.

Investment Avenues	Awareness*					Preference**					Amount
	I	II	III	IV	V	I	II	III	IV	V	
Bank Fixed Deposits											
Post Office Schemes											
M.S.S./N.S.C.											
Provident Fund/P.P.F.											
Govt. Bonds/Debentures											
Life Insurance											
Land and Property/Real Estate											
Precious Metals/Stones/Arts											
Mutual Funds											
Currency											
Equity Shares											
Other, Specify i)											
ii)											
iii)											
iv)											
v)											

***Awareness:** I - Well Known, II – Known, III – Average, IV - Not Well Known, V- Not Known at all.

** **Preference:** I – Mostly Prefer, II – Prefer, III – Average, IV – Not Prefer, V – Not at all Prefer.

8. What is the source of information about investment avenues? **(Give Rank)**

i.	Television		ii.	News Paper	
iii.	Magazines & Journals		iv.	Radio	
v.	Local Contacts		vi.	Friends	
vii.	Hoardings		viii.	Financial Consultant	
ix.	Family Members		x.	Relatives	
xi.	Sales Executives/Agents		xii.	Internet	
xiii.	Other				

9. Do you get sufficient information from these sources?

- i. Yes ii. No

if no, what is the other sources you look for? Please specify _____.

10. Holder of Investment:

i.	Own Name		ii.	Spouse	
iii.	Children		iv.	Joint Holder	

Why, reason _____.

11. Mention the duration of your investment.

i.	Short Term (Less than 1 year)		ii.	Medium Term (1 year – 3 years)	
iii.	Long Term (More than 3 years)				

Why, reason _____.

C) Factor Consider for Investment:

1. Which factors do you consider when you invest? **(Give Rank)**

i.	Risk		ii.	Return	
iii.	Tax Benefit		iv.	Liquidity	
v.	Safety		vi.	Other	

2. Motive for your Investment:

Sr. No.	Parameter	Rank	Sr. No	Parameter	Rank
i.	Maximum Return		ii.	Capital appreciation	
iii.	Future Obligation- Retirement		iv.	Security Purpose	
v.	Future Obligation- Children's Education		vi.	Tax Saving	
vii.	Future Obligation- Marriage of Children		viii.	House	
ix.	Hedge Against Inflation		x.	Other	

3. Your Satisfaction Level & Future Preferences regarding various investment avenues.

Investment Avenues	Satisfaction Level					Future Preferences
	Fully Satisfied	Satisfied	Neutral	Dissatisfied	Fully Dissatisfied	
Bank Fixed Deposits						
Post Office Schemes						
N.S.S./N.S.C.						
Provident Fund/P.P.F.						
Govt. Bonds/Debentures						
Life Insurance						
Land Property/Real Estate						
Precious Metals/Stones/Arts						
Mutual Funds						
Currency						
Equity Shares						
Other Specify i)						
ii)						
iii)						
iv)						
v)						