

Understand Your Client

(Consultant to fill up the form with the best knowledge and understanding of client)



RUNNING | STREAM

Consultant's Details

Full Name		Date	
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Relationship

How did you invite the client?	
How do you know the client?	
What does the client know you as?	

Client's Profile

Full Name		Preferred Name	
Age *		Marital Status	Single/ Engaged /Married /Divorced/Widowed
Gender	Male / Female	Race	
Residing Country		Nationality *	
Mobile		Email	

Family Profile

Residing Country		Close with Family	
Family Business		Siblings	
Family member's background (ie. Does client have kids? Does client have family members or relatives residing overseas? If yes, where?) *			

Occupation / Industry

Past work experience(s)	
Current occupation*	
Current sideline (if any)	
Achievement(s)	

Financial*

Type of Income*	Self Employed / Salaried	Income Range* (per month)	
Financial Commitment(s)			
Debts (if any)			

Private & Confidential

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Investment experience(s)*

Investment Type and Product (ie. stock, bond, property etc)	
Investment purpose (ie. diversification, add. income etc)	
Past investment experience (ie. successful, failed)	
Current investment(s) (if any)	

Property investment experience(s)*

Does client have any prior property investment experience(s)?	Yes	No
If yes, please indicate :		
Does client currently own any overseas property as investment?	Yes	No
If yes, please indicate :		

Client's Preferences*

Purpose of Investment	Income / Retirement / Portfolio Diversification / Children's Education / Migration Others: _____	
Is client keen to purchase?	Yes	No
If yes, please indicate:		
Preferred Country, State		
Budget		
Preferred Asset Type	Houses / Townhouses / Apartments or Units / Commercial Others: _____	
If no, please indicate client's concern:		

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Others

Client's hobbies <i>(What does client enjoy doing)</i>	
How does client spend most of his/her time?	
What does client want to achieve next?	
How can our product and services help client achieve his/her aspirations?	

Consultant Notes

Negative		Neutral		Interested	
Prospect Concerns/Feedback (if any):					
What and How we do to help? Please propose strategy/Next step of actions :					

Attach namecard (if any)

Confidentiality

In the course of executing this profiling form, Client(s) details shall be kept confidential. All parties including Business Partner, Consultant and Runningstream are expected to maintain confidentiality of these information and shall not distribute any of such information to anyone in any form or media.