

Understand Your Prospect

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



RUNNING | STREAM

Recruiter's Details

Full Name		Date	
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Relationship

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

Prospect's Profile

Name		Gender	Male / Female
Date of Birth (dd/mm/year)		Marital Status	Single/ Engaged /Married /Divorced/Widowed
Residing Country		Nationality	
Race		Religion	
Mobile		Email	

Education

Highest Education Level	
Course of Study	
Graduate School	
Experience in Study/Living Abroad	

Family Profile

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

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Occupation / Industry*

Past Work Experience(s) *	
Have the prospect done any financial, property, direct sales, network marketing before? If yes, please indicate *	
Current Occupation *	
Company Name	
Current Work Description (ie. industry, years of experience, role)	
Sideline(s) (if any) *	
License(s) (if any) *	
Achievement(s)	

Financial*

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

Investment experience(s)*

Does prospect invests into other products? (ie. stock, bond, etc)	Yes	No
If yes, please indicate :		
Does prospect have any prior property investment experience(s)?	Yes	No
If yes, please indicate :		
Does prospect currently own any overseas property as investment?	Yes	No
If yes, please indicate :		

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Prospect's Preference*

Prospect Purpose of Joining the Network:	✓ / X	Remarks
Personal Development Growth		
Part Time, Gain More Income		
Career Switch		
Knowledge, Education		
Others		

Others

Energy Level	
Prospect's Hobbies <i>(What does prospect enjoy doing)</i>	
How does prospect spend most of his/her time?	
What does prospect want to achieve next?	
What is the current income gap to prospect's ideal income per month/per year for him/her to live comfortably?	

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.

Private & Confidential