

QUESTIONNAIRE · SAVINGS, LIFE INSURANCE & RETIREMENT

Savings, life insurance and retirement questionnaire

Information needed for your study — to be returned to info@assudire.fr

Answer what applies to you: only your contact details are required. This questionnaire prepares our meeting; your investor profile will be confirmed with your adviser before any subscription.

1. YOU

The policyholder.

Title : ☐ Mrs / Ms ☐ Mr First name : Last name :

Date of birth : Marital status : ☐ Single ☐ Married / civil partnership ☐ Living with partner
☐ Divorced ☐ Widowed

Address : Postcode : Town :

Phone : Email :

Occupation : Status : ☐ Employee ☐ Self-employed ☐ Retired ☐ Student ☐ Not working

2. YOUR PROJECT

What these savings should achieve for you.

Project : ☐ Life insurance (savings) ☐ Retirement / PER ☐ Invest a lump sum ☐ Advise me

Goals : ☐ Prepare for retirement ☐ Pass on my estate ☐ Reduce my taxes ☐ Fund a project ☐ Top up my income
☐ Emergency savings

Time horizon : ☐ Under 4 years ☐ 4 to 8 years ☐ Over 8 years Initial payment : € Regular payments : € / month

Home postcode : Tax resident in France : ☐ Yes ☐ No ☐ Moving in progress

3. YOUR ASSETS

Rough figures are enough.

Household net income : € / year Marginal tax rate : ☐ 0 to 11 % ☐ 30 % ☐ 41 % or 45 % ☐ I don't know

Available savings : € Property (net value) : € Dependants :

Products already held : ☐ Savings accounts ☐ Life insurance (savings) ☐ Retirement plan (PER, PERP, Madelin) ☐ Share savings plan or securities account ☐ SCPI (property funds) ☐ None

4. YOUR ATTITUDE TO RISK

A first idea; we will confirm it together.

If your savings fell by 10 % : ☐ I sell everything ☐ I wait ☐ I invest more

Knowledge of financial markets : ☐ Beginner

☐ Some knowledge ☐ Good

Profile considered : ☐ Cautious ☐ Balanced

☐ Dynamic ☐ Advise me

Options : ☐ Regular payments ☐ Managed portfolio ☐ Locking in gains ☐ Transfer of old plans

☐ Tailored beneficiary clause ☐ Annuity payout

Start date : ☐ As soon as possible ☐ Within a month ☐ Before the end of the year ☐ Later

Details, constraints or questions :

5. DOCUMENTS TO ATTACH

Photos or scans are fine.

☐ Latest tax notice ☐ Statements of your current products ☐ ID document ☐ Bank details (IBAN)

This questionnaire commits you to nothing. Before any subscription, your adviser records your demands and needs and confirms your investor profile with you, as the regulations require.

DECLARATION AND SIGNATURE

I certify that the information above is accurate; it forms the basis of the study and, where applicable, of the policy. Any concealment or misrepresentation is subject to the penalties of articles L.113-8 and L.113-9 of the French Insurance Code. ASSUDIRE processes the data collected to study my needs and manage the policy, under the conditions of the information document (section 8); I agree to be contacted.

Signed at: Date:

The policyholder

Signature

For ASSUDIRE use

Received on · adviser · study reference