

Wealth Solutions (Individual Clients)



NAME OF CLIENT: _____

CONTACT DETAILS: _____

PRIORITIES	POTENTIAL SOLUTIONS	
<p>Create & Build</p>	 <ul style="list-style-type: none"> <input type="checkbox"/> Business Banking <input type="checkbox"/> Multi-currency Transactional Banking <input type="checkbox"/> Property Financing <input type="checkbox"/> Lending Solutions <input type="checkbox"/> Credit Cards <input type="checkbox"/> Offshore Banking <input type="checkbox"/> Forex Trading 	 <ul style="list-style-type: none"> <input type="checkbox"/> Income Protector Insurance <p>H</p> <ul style="list-style-type: none"> <input type="checkbox"/> Professional Indemnity Cover <input type="checkbox"/> Property Insurance
<p>Live & Enjoy</p>	 <ul style="list-style-type: none"> <input type="checkbox"/> Family Banking <input type="checkbox"/> Children's Accounts <input type="checkbox"/> Vehicle and Asset Finance <input type="checkbox"/> Home Loans <input type="checkbox"/> Supplementary Credit Cards <input type="checkbox"/> Instant Mobile Loans <input type="checkbox"/> MoneyGram <input type="checkbox"/> Foreign Exchange 	 <ul style="list-style-type: none"> <input type="checkbox"/> Home/Vehicle Loan Protector <input type="checkbox"/> Motor Insurance <input type="checkbox"/> Education Plans <p>H</p> <ul style="list-style-type: none"> <input type="checkbox"/> Travel Insurance <input type="checkbox"/> Personal Accident Cover
<p>Save & Invest</p>	 <ul style="list-style-type: none"> <input type="checkbox"/> Savings Account <input type="checkbox"/> Call Deposit Account <input type="checkbox"/> Fixed Deposit Account <input type="checkbox"/> Treasury Bills & Bonds <input type="checkbox"/> Bonds <input type="checkbox"/> Stockbroking <input type="checkbox"/> Diaspora Banking <input type="checkbox"/> Offshore Investments: <ul style="list-style-type: none"> <input type="checkbox"/> Discretionary and Investment Management <input type="checkbox"/> International Fund Solutions 	 <ul style="list-style-type: none"> <input type="checkbox"/> Individual Retirement Plan <input type="checkbox"/> Savings Plan / Lifestest Plan <p>STANLIB</p> <ul style="list-style-type: none"> <input type="checkbox"/> Money Market Fund <input type="checkbox"/> Bond Fund <input type="checkbox"/> Balanced Fund <input type="checkbox"/> Equity Fund <input type="checkbox"/> Real Estate Investment Trust <input type="checkbox"/> Umbrella Individual Pension Plans
<p>Share & Legacy</p>	 <ul style="list-style-type: none"> <input type="checkbox"/> Stockbroking <input type="checkbox"/> Offshore Accounts <input type="checkbox"/> Family Banking 	<p>STANLIB</p> <ul style="list-style-type: none"> <input type="checkbox"/> Money Market Fund <input type="checkbox"/> Bond Fund <input type="checkbox"/> Balanced Fund <input type="checkbox"/> Equity Fund <input type="checkbox"/> Real Estate Investment Trust <input type="checkbox"/> Umbrella Individual Pension Plans
<p>Plan & Protect</p>	 <ul style="list-style-type: none"> <input type="checkbox"/> Trusts (Offshore) 	 <ul style="list-style-type: none"> <input type="checkbox"/> Endowment Policies <input type="checkbox"/> Funeral Plans <input type="checkbox"/> Individual Life Insurance <input type="checkbox"/> Individual Retirement Solutions <input type="checkbox"/> Small and Medium Enterprise Life Insurance <p>H</p> <ul style="list-style-type: none"> <input type="checkbox"/> Packaged Short-term Covers: <i>Home Owners, Private Motor Vehicle, Golfers, Personal Accident, Bereavement Expenses, Personal Liability; Hospital Cash, Domestic Servants, Work Injury, Legal Expenses, Pets, Water Craft</i> <ul style="list-style-type: none"> <input type="checkbox"/> Agriculture: Crops and Livestock