Personal Financial Plan Questionnaire

Generated on: 2025-07-17
Total Questions: 100
Total Points: 1000

1. Are you a salaried employee?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

2. Do you have a Pension Plan?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

3. Do you have a Provident Fund (PF) or any other Retirement Fund?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

4. Do you have a pension?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

5. Do you have any other sources of income?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

6. Do you have a Will?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

7. Do you have an Insurance Policy (Life Insurance, Health Insurance, Car Insurance, Home Insurance, etc.)?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

8. Do you have a Mediclaim Policy?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

9. Do you have a Term Insurance Policy?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

10. Do you have a Car Insurance Policy?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

11. Do you have a Home Insurance Policy?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

12. Do you have any other Insurance Policy?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

13. Do you have a Medical Insurance Policy?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

14. Do you have a Critical Illness Insurance Policy?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

15. Do you have a Personal Accident Insurance Policy?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

16. Do you have a Disability Insurance Policy?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

17. Do you have a Long Term Care Insurance Policy?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

18. Do you have a Travel Insurance Policy?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

19. Do you have a Pet Insurance Policy?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

20. Do you have a Cyber Insurance Policy?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

21. Do you have a Business Insurance Policy?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

22. Do you have a Liability Insurance Policy?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

23. Do you have a Property Insurance Policy?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

24. Do you have a Crop Insurance Policy?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

25. Do you have a Livestock Insurance Policy?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

26. Do you have a Fire Insurance Policy?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

27. Do you have any other Insurance Policy?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

28. Do you have a Bank Account?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

29. Do you have a Fixed Deposit (FD) Account?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

30. Do you have a Recurring Deposit (RD) Account?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

31. Do you have a Savings Account?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

32. Do you have a Demat Account?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

33. Do you have a Trading Account?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

34. Do you have a Mutual Fund Account?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

35. Do you have a Gold Account?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

36. Do you have a Cryptocurrency Account?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

37. Do you have any other Investment Account?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

38. Do you have a Home Loan?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

39. Do you have a Car Loan?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

40. Do you have a Personal Loan?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

41. Do you have a Business Loan?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

42. Do you have any other Loan?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

43. Do you have a Credit Card?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

44. Do you have any other Credit Card?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

45. Do you have a Debit Card?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

46. Do you have any other Debit Card?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

47. Do you have a Prepaid Card?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

48. Do you have any other Prepaid Card?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

49. Do you have a Gift Card?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

50. Do you have any other Gift Card?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

51. Do you have a Loyalty Card?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

52. Do you have any other Loyalty Card?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

53. Do you have a Pension Plan?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

54. Do you have a Provident Fund (PF) or any other Retirement Fund?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

55. Do you have a Will?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

56. Do you have an Insurance Policy (Life Insurance, Health Insurance, Car Insurance, Home Insurance, etc.)?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

57. Do you have a Mediclaim Policy?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

58. Do you have a Term Insurance Policy?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

59. Do you have a Car Insurance Policy?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

60. Do you have a Home Insurance Policy?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

61. Do you have any other Insurance Policy?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

62. Do you have a Medical Insurance Policy?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

63. Do you have a Critical Illness Insurance Policy?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

64. Do you have a Personal Accident Insurance Policy?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

65. Do you have a Disability Insurance Policy?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

66. Do you have a Long Term Care Insurance Policy?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

67. Do you have a Travel Insurance Policy?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

68. Do you have a Pet Insurance Policy?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

69. Do you have a Cyber Insurance Policy?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

70. Do you have a Business Insurance Policy?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

71. Do you have a Liability Insurance Policy?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

72. Do you have a Property Insurance Policy?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

73. Do you have a Crop Insurance Policy?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

74. Do you have a Livestock Insurance Policy?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

75. Do you have a Fire Insurance Policy?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

76. Do you have any other Insurance Policy?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

77. Do you have a Bank Account?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

78. Do you have a Fixed Deposit (FD) Account?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

79. Do you have a Recurring Deposit (RD) Account?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

80. Do you have a Savings Account?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

81. Do you have a Demat Account?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

82. Do you have a Trading Account?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

83. Do you have a Mutual Fund Account?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

84. Do you have a Gold Account?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

85. Do you have a Cryptocurrency Account?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

86. Do you have any other Investment Account?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

87. Do you have a Home Loan?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

88. Do you have a Car Loan?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

89. Do you have a Personal Loan?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

90. Do you have a Business Loan?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

91. Do you have any other Loan?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

92. Do you have a Credit Card?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

93. Do you have any other Credit Card?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

94. Do you have a Debit Card?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

95. Do you have any other Debit Card?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

96. Do you have a Prepaid Card?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

97. Do you have any other Prepaid Card?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

98. Do you have a Gift Card?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

99. Do you have any other Gift Card?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

100. Do you have a Loyalty Card?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0

101. Do you have any other Loyalty Card?

Answer Choices	Points Obtainable	Selected Points
Yes	10	10
No	0	0