

Risk Assessment Form



PERSONAL INFORMATION

Full Name :

Address :

Date of Birth :

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Phone :

Email :

Married Status :

Gender :

Country :

Looking to Buy Property ?

Studio Apartment

1 BHK

2 BHK

3 BHK

4 BHK

5 BHK

LAND

COMMERCIAL SPACE

1. Income & Cash Flow Stability

A.What is your monthly household income (after tax)?

B.Are there multiple income earners in the household? If yes, what are their roles and incomes?

C.Is your income (e.g., commission-based, business profit, farming)?

Fixed

Variable

Seasonal

D.Are there any expected changes in income in the next 1–5 years (e.g., retirement, job switch)?

Yes

No

E.Are you expecting any temporary or permanent career breaks
A.What is your monthly household income (after tax)?

Yes

☐

No

☐

2. Assets, Savings & Liquidity

A. What is your total liquid savings (cash, FDs, mutual funds, stocks)?

B. Do you have any long-term investments (real estate, gold, ULIPs, retirement funds)?

Yes

☐

No

☐

C. How much capital are you planning to use for this property purchase?

D. Will you have an emergency fund remaining after the purchase (min. 6 months of expenses)?