



**Business Owner**

Name of Primary Business: \_\_\_\_\_ Nature of Primary Business: \_\_\_\_\_

Annual business turnover (in INR): \_\_\_\_\_

Percentage ownership in business: \_\_\_\_\_

Names & percentage of ownership of other holders: \_\_\_\_\_

No. of employees: \_\_\_\_\_ No. of locations/offices: \_\_\_\_\_

Estimated annual net income (in INR): \_\_\_\_\_ No. of years in business: \_\_\_\_\_

Details of market penetration ( in %): \_\_\_\_\_

Primary trade areas: \_\_\_\_\_

Any significant patents/inventions: \_\_\_\_\_

Is the company listed:  Yes  No Does the company receive revenues from Government contracts/licenses:  Yes  No

**Others** (Please choose one below):  Retired  Student  Homemaker  Other (Please specify): \_\_\_\_\_

If retired/Unemployed, please provide details of prior employment. For Homemaker / Student, please provide details for your spouse or guardian.

Name of Organization: \_\_\_\_\_

Nature of Employment:  Self- Employed  Salaried

Nature of Business: \_\_\_\_\_

Number of years in employment or business: \_\_\_\_\_

Annual Income (in INR): \_\_\_\_\_

Please note: If number of years in current organisation is less than 2 years, Please provide previous employment details:

Current source of wealth: \_\_\_\_\_

**(III) Details of Wealth from other sources**

**Details of Inheritance**

From whom was the inheritance received: \_\_\_\_\_

How was the wealth created: \_\_\_\_\_

Type of inheritance received (Real estate, Securities, Cash etc): \_\_\_\_\_

Amount inherited: \_\_\_\_\_ Percentage of ownership of wealth inherited: \_\_\_\_\_

**Details of Investments**

Where did source of wealth originate \_\_\_\_\_

What are the investments into (Real estate, stocks, mutual funds): \_\_\_\_\_

What is the current size of the investment: \_\_\_\_\_

What is the estimated capital appreciation on the investment: \_\_\_\_\_

How long have you been an investor: \_\_\_\_\_

**(IV) Net Worth Details: Please provide approximate details of the following (in INR)**

Total Assets: \_\_\_\_\_ Total Liabilities: \_\_\_\_\_

Net Worth\*: \_\_\_\_\_

\*Net Worth is calculated by subtracting your liabilities (Loans, Mortgages etc.) from your assets (Cash, Investments, Real Estate, Jewelry etc.)

I hereby confirm that the information given by me above is true and correct to the best of my knowledge.

Name of Account Holder

Signature of Account Holder

Date: