

Risk Profile Form

Distributor Name:

ARN No.:

AMFI-registered Mutual Fund Distributor

Customer Name:

E Mail ID:

Mobile No:

1. What is your age group?

- ☐ 20 to 35
- ☐ 35 to 50
- ☐ 50 to 60
- ☐ Above 60

2. What would be your time horizon for Mutual Fund?

- ☐ Less than 1 year
- ☐ 1 to 3 years
- ☐ 3 to 5 years
- ☐ 5 to 10 years
- ☐ More than 10 years

3. What is your source of Income?

- ☐ Business
- ☐ Profession
- ☐ Service
- ☐ Other _____

4. What is your investment goals?

- ☐ Child Education
- ☐ Contingency Fund
- ☐ Retirement
- ☐ Other _____

Basis the above information and your risk profile and suitability of products, we recommended the following schemes to aid you (Investor) in making a choice:

Category:

Sub Category:

Schemes:

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.

Note: As per SEBI Regulations, We provide “Incidental Advisory” with respect to Mutual Fund products. This includes providing basic advice limited to such schemes / products being recommended by us to our prospective clients and recommending a curated list of mutual fund schemes to the prospective clients based on our assessment of investor’s risk profile and suitability of product being recommended to aid investor in making a choice.