











My Wealth Needs

PRIORITIES	My Possible Needs	
<p>Create & Build</p>	 <ul style="list-style-type: none"> <input type="checkbox"/> I earn a salary and would like to open a bank account and have a credit card <input type="checkbox"/> I am thinking of buying property in the near future and would need financing <input type="checkbox"/> I transact with people/businesses outside the country and require an offshore account <input type="checkbox"/> I have a business and require a business account 	 <ul style="list-style-type: none"> <input type="checkbox"/> I want to protect my income against unforeseen events <p>H</p> <ul style="list-style-type: none"> <input type="checkbox"/> As a professional I need to protect myself against potential legal liability to third parties <input type="checkbox"/> I have property that I would like to insure <input type="checkbox"/> Other : _____
<p>Live & Enjoy</p>	 <ul style="list-style-type: none"> <input type="checkbox"/> I am interested in family banking and opening accounts for my children <input type="checkbox"/> I am thinking of buying a car and require vehicle finance <input type="checkbox"/> I am planning to buy a home and would need property finance <input type="checkbox"/> I would like my spouse to have a credit card linked to my bank account <input type="checkbox"/> I am thinking of buying land and require finance <input type="checkbox"/> I would like a loan that I can access via my mobile phone <input type="checkbox"/> As a result of my travels and business interests I need access to Foreign Exchange on a regular basis 	 <ul style="list-style-type: none"> <input type="checkbox"/> I would like to protect my home loan should I no longer be able to service it <input type="checkbox"/> I would like to protect myself should I be in an accident <input type="checkbox"/> I want to secure and save for my children's education <p>H</p> <ul style="list-style-type: none"> <input type="checkbox"/> We are planning to travel and require travel insurance <input type="checkbox"/> I am interested in personal accident cover <input type="checkbox"/> I would like to protect my vehicle should I be involved in an accident <input type="checkbox"/> Other : _____
<p>Save & Invest</p>	 <ul style="list-style-type: none"> <input type="checkbox"/> I would like to open a savings account <input type="checkbox"/> I would like to open a fixed deposit account <input type="checkbox"/> I am interested in investing money offshore <input type="checkbox"/> I want to invest in bonds or on the stock market <input type="checkbox"/> I spend a lot of time working abroad and would like a banking solution tailored to my needs 	 <p>STANLIB</p> <ul style="list-style-type: none"> <input type="checkbox"/> I would like to start planning for retirement <input type="checkbox"/> I would like to invest for a long-term goal <input type="checkbox"/> I would like to invest for a short-term goal <input type="checkbox"/> Other : _____
<p>Share & Legacy</p>	 <ul style="list-style-type: none"> <input type="checkbox"/> I am interested in online share trading <input type="checkbox"/> I am interested in taking money offshore <input type="checkbox"/> I would like my whole family to bank with Stanbic Bank 	<p>STANLIB</p>  <ul style="list-style-type: none"> <input type="checkbox"/> I would like to invest for a long-term legacy goal <input type="checkbox"/> I would like to invest for a short-term legacy goal <input type="checkbox"/> Other : _____
<p>Plan & Protect</p>	 <ul style="list-style-type: none"> <input type="checkbox"/> I am interested in setting up an offshore trust to ensure the seamless transfer of assets to future generations 	 <ul style="list-style-type: none"> <input type="checkbox"/> I would like to save and receive a lump sum payment upon retirement (or death) <input type="checkbox"/> I am interested in putting away money to cover my last expenses <input type="checkbox"/> I would like to take out life insurance <p>H</p> <ul style="list-style-type: none"> <input type="checkbox"/> I would like to make sure my business, assets and family are protected against unforeseen events <input type="checkbox"/> Other : _____



My Details

Name & Surname	
Telephone Number	
Email	
Gender	<input type="checkbox"/> Male <input type="checkbox"/> Female
Date of Birth	
Marital Status	<input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Divorced <input type="checkbox"/> Widowed
Profession	<input type="checkbox"/> Self-employed Professional <input type="checkbox"/> Corporate Employee <input type="checkbox"/> Entrepreneur Role and Title: _____
Are You an Existing Client Of:	<input type="checkbox"/> Stanbic Bank <input type="checkbox"/> Liberty <input type="checkbox"/> Heritage <input type="checkbox"/> STANLIB <input type="checkbox"/> SIAL <input type="checkbox"/> SBG Securities