

# JULAINAH & ASSOCIATES



Company Name:.....

No of employees:..... Payroll Deduction Availability: Yes / No

Tel:.....

Contact person:.....

Discussed items	Yes / No	Assured / Coverage	Provider	Exp. Date	Remarks
<b>WEALTH ACCUMULATION</b>					
<b>INVESTMENT</b>	<b>INVESTMENT-LINKED PRODUCT</b>				
Retirement Planning					
Education Planning					
Single & Regular Investment					
Capital Builder Account					
Guaranteed Income Endowment					
Wealth Accumulation-\$ makes \$					
Estate Planning					
<b>WEALTH DISTRIBUTION</b>					
<b>ISLAMIC &amp; CONVENTIONAL WILL WRITING</b>	<b>WRITE A WILL BEFORE ITS TOO LATE!</b>				
Will Advisor					
Will Writing					
Administration of the will					
Joint Asset (Husband & Wife)					
Gift					
<b>WEALTH PRE-SEARCH</b>					
Have you or your company fully used the 19% tax relief allowance?					
<b>FINANCIAL NEED ANALYSIS PLANNING</b>					
<b>FNA</b>	<b>FINANCIAL NEED ANALYSIS PLANNING</b>				
Financial Health Check-up					
Income Protection Need					
Education Need					
Retirement Need					
Investment Need					
<b>SOLELY WORK ON BY REFERRALS</b>					
<b>REFERRAL LEADS</b>	<b>SOLELY WORK ON BY REFERRALS</b>				
<b>DON'T YOU DESERVE MORE FROM LIFE</b>					
<b>RECRUITMENT</b>	<b>DON'T YOU DESERVE MORE FROM LIFE</b>				
ASSOCIATES					
PARTNERSHIP (FRANCHISE)					

