



PNB MetLife India Insurance Company Limited

Registered office: Unit No. 701, 702 & 703, 7th Floor, West Wing, Raheja Towers, 26/27 M G Road, Bangalore -560001, Karnataka. IRDA of India Registration number 117.
 CI No. U66010KA2001PLC028883, Call us Toll-free at 1-800-425-6969, Website: www.pnbmetlife.com, Email: indiaservice@pnbmetlife.co.in or write to us at 1st Floor, Techniplex -1,
 Techniplex Complex, Off Veer Savarkar Flyover, Goregaon (West), Mumbai – 400062. Phone: +91-22-41790000, Fax: +91-22-41790203

NEED ANALYSIS FORM

Name: _____

Address: _____

Mobile/Landline: _____ Email Address: _____

PNB MetLife Branch Name: _____

Account Number: _____

Bank Branch Name: _____

Please tick mark on the correct option:

Your Age Bracket?

- 18-25 26-30 31-40 41-50 51-60 60 plus

Your Income Bracket?

- Upto 5 lacs 5-15 lacs 15 lacs and above

Your Gender?

- Male Female Other

Your Martial Status?

- Newly Married Married with Kids Married with grown up kids

Your Profile?

- Young Professionals Near Retirement Retired

Your Need?

- Health/Protection Child Education Wealth Creation Retirement
 Regular Income

Your Risk Appetite?

- Low Medium High

Product Suitability Guide*

Annual Income Bracket	Age	Upto 25	26 - 30	31 - 40	41 - 50	51 - 60	60+
15 lakhs & above	Wealth Creation/Savings			MetLife Endowment Savings Plan/MetLife Endowment Savings Plan Plus MetLife Guaranteed Savings Plan			
	Retirement			MetLife Smart Platinum	MetLife Dhan Samridhhi MetLife Smart One MetLife Mera Wealth Plan		
	Child Education					MetLife Retirement Savings Plan MetLife Immediate Annuity Plan	MetLife Immediate Annuity Plan
	Health/Protection			MetLife Smart Child	MetLife Family Income Protector Plus-TROP		
	Regular Income			MetLife Major Illness Premium Back Cover MetLife Mera Heart and Cancer Care	MetLife Monthly Income Plan-10 pay MetLife Guaranteed Income Plan MetLife Money Back Plan		
5-15 lakhs	Wealth Creation/Savings			MetLife Endowment Savings Plan/PNB MetLife Endowment Savings Plan Plus MetLife Guaranteed Savings Plan			
	Retirement			MetLife Smart Platinum	MetLife Smart One		
	Child Education				MetLife Retirement Savings Plan MetLife Immediate Annuity Plan		MetLife Immediate Annuity Plan
	Health/Protection			MetLife Smart Child MetLife College Plan	MetLife Family Income Protector Plus-TROP		
	Regular Income			MetLife Major Illness Premium Back Cover PNB MetLife Mera Heart and Cancer Care	MetLife Monthly Income Plan-10 pay MetLife Guaranteed Income Plan MetLife Money Back Plan		
upto 5 lakhs	Wealth Creation/Savings			MetLife Bachat Yojana MetLife Guaranteed Savings Plan			
	Retirement				MetLife Retirement Savings Plan		MetLife Immediate Annuity Plan
	Child Education				MetLife Bhavishya Plus		
	Health/Protection			MetLife Family Income Protector Plus MetLife Grameen Ashray			
	Regular Income			MetLife Guaranteed Income Plan			
	Profile	Young Professionals	Newly Married	Married with Kids	Married with Grown up Kids	Near Retirement	Retired
	Legend	ULIP	Income	Child	Savings		
			A&H	Term	Retirement		

*This is only an indicative product guide. The Actual Life Insurance cover bought by an individual is purely his/her own decision.

Product Recommended: _____

Product chosen by customer: _____

Product chosen suits life style needs & income profile as per the product suitability guide

Product chosen doesn't fit the life style needs & income profile as per the product suitability guide

Reason (Optional): _____


Customer Name: _____ Customer Signature: _____

SP Name: _____ SP Code: _____ Signature: _____

Branch Head Name: _____ Signature: _____

ARM Name: _____ ARM Code: _____

The participation by bank's customer shall be purely on a voluntary basis. The contract of insurance is between the insured and the insurer and not between the bank and the insured. For more details about the product, please refer to the product brochure.

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Milkar life aage badhain.