



CHECKLIST

Insurance and Pension Review

- | | Yes | No |
|---|--------------------------|--------------------------|
| 1. Are you interested in an insurance comparison?
<i>Car, health, legal insurance etc.</i> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Are you interested in a pillar 3a? | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Would you like a comparison of your pillar 3 savings? | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. Would you be interested in a pension analysis (Pillar 1 & 2)? | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. Would you like to know more on how to buy property in Switzerland? | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. Would you be interested comparing your current Swiss mortgage? | <input type="checkbox"/> | <input type="checkbox"/> |
| 7. Are you interested in comparing your investments or making new investments? | <input type="checkbox"/> | <input type="checkbox"/> |
| 8. None of the above. I/we don't require a consultation. | <input type="checkbox"/> | <input type="checkbox"/> |

I agree to be contacted by a Swiss Prime International Consultant to discuss my above choices.

Client Name(s)

Place/Date

Client Signature(s)

Advisor Signature