



**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](http://www.pnbmetlife.com), Email: [indiaservice@pnbmetlife.co.in](mailto: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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### Your Martial Status?

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### Your Profile?

Young Professionals     Near Retirement     Retired

### Your Need?

Health/Protection     Child Education     Wealth Creation     Retirement  
 Regular Income

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**Product Suitability Guide\***

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*Milkar life aage badhain.*