

Motivation	Savings	Cheque	MoneyMarket	Money Builder	Investment Advantage	Savings Call Account	Notice Deposit	Target Save	Islamic Target Save	Future Plan	Credit Card
Minimum requirements met	★	★	★	★	★	★	★	★	★	★	★
Nature of Investment	★	★	★	★	★	★	★	★	★	★	★
Term of Investment	★	★	★	★	★	★	★	★	★	★	★
Validity											
Validity of Advice	2 Days										

Take into account:
 Reason for Investment: ie
 Deposit for car/Holiday/For a rainy day/etc
 Take current portfolio into consideration: Home Loan with Flexi Reserve/Other investments (Long/Medium Term)/etc Current market trends/rate changes in the short-term/etc