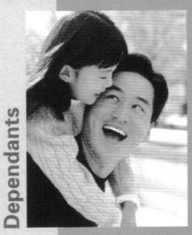
# Simple AIA FinancialHealth™ Check

Spenders



Dependants

Accumulators

Preservers

| | please ✔ |
|---|---|
| 1. I have a Will to distribute my assets to my loved ones according to my wishes. | ☺ ● |
| 2. I have life insurance coverage of at least 10 times my annual income. | ☺ ● |
| 3. If I were to lose my job now, I have enough savings to provide for at least six months of my monthly expenses. | ☺ ● |
| 4. I have started building my retirement fund of at least 10 times my annual income. | ● ☹ |
| 5. I have critical illness insurance coverage of at least 2 times my annual income. | ☺ ● |
| 6. My health insurance plan will take care of my medical and hospital bills without any out-of-pocket expenses from me. | ☺ ● |
| 7. I have a trusted financial professional who looks after my financial well-being. | ☺ ● |
| 8. I have started to plan for my children's university education funding. | ☺ ☹ ● |
| 9. My house will be fully paid for in the event of my death or permanent disability. | ● ☹ NA |
| 10. If I were to sell my house now, I would have more than enough money to pay off the outstanding mortgage. | ☺ ☹ ● |

## Your Simple AIA Financial Health Check Result:

**Instructions:** Count the numbers of "☹" in your answer column. Then refer to the suggestions given in the various categories

| Zero "☹" | 1 to 3 "☹" | 4 or more "☹" |
|---|---|---|
| *Fantastic!* | *Monitor!* | *Alert!* |
| Good job! You are managing your life's financial concerns well. You might want to think about building up some other savings and investments. Consult your AIA Financial Services Consultant to review what you already have and plan ahead for your other needs. | Most of your financial concerns seem to be under control at the moment. Whatever your circumstances, it is good to review your unfulfilled concerns immediately. Make an appointment with your AIA Financial Services Consultant today. He/she will review your situation and advise you accordingly. | You should be on "Red Alert!" What if the worst were to happen – will your loved ones be able to manage financially? You would ask – what should I do next? Make an appointment with your AIA Financial Services Consultant today. Don't worry if this exercise has given you lots to think about. He/she can help you with your financial concerns. |

**Note:** *This Simple* **AIA** *Financial Health Check is for your information only and does not have regard to the specific investment objectives, financia situation and particular needs of any persons. The results are not necessarily reflective of your specific financial situation nor are they meant t be advice given by AIA. You can choose to agree or disagree to the suggestions given. Please consult your AIA Financial Services Consultant fo further advice tailored to your personal circumstances.*

AIA FinancialHealth™ Check

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