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Question 1

Question Type: MultipleChoice

Section A (1 Mark)

A "Family Office" segment client has investible assets worth of

Options:

- A) \$20,000,000
- B) \$50,000,000
- C) \$75,000,000
- D) \$100,000,000

Answer:

D

Question 2

Question Type: MultipleChoice

Section A (1 Mark)

In "CAMPARI" Model, R stands for:

Options:

- A) Refinance Terms
- B) Resale Terms
- C) Repayment Terms
- D) Revision Terms

Answer:

C

Question 3

Question Type: MultipleChoice

Section A (1 Mark)

During "Teen age years" life stage, typical asset allocation should be

Options:

- A) 25% equities, rest in fixed income instruments
- B) 50% equities, rest in fixed income instruments
- C) 75% equities, rest in fixed income instruments
- D) None of the above

Answer:

D

Question 4

Question Type: MultipleChoice

Section A (1 Mark)

A "Family Office" segment client has investible assets worth of

Options:

- A) \$20,000,000
- B) \$50,000,000
- C) \$75,000,000
- D) \$100,000,000

Answer:

D

Question 5

Question Type: MultipleChoice

Section A (1 Mark)

"Early accumulation" life stage is normally during _____

Options:

- A) 12- 19 years
- B) Our 20s
- C) 30-40
- D) Retirement years

Answer:

C

Question 6

Question Type: MultipleChoice

Section A (1 Mark)

During "Building the foundation" life stage, we learn about _____

Options:

- A) Budgeting

- B) Five Fundamental of Fiscal Fitness
- C) Three Fundamental of Fiscal Fitness
- D) Seven Fundamental of Fiscal Fitness

Answer:

B

Question 7

Question Type: MultipleChoice

Section A (1 Mark)

For a "single income family" priority is on

Options:

- A) Protecting income via a term plan
- B) Investing in commodities to grow wealth

- C) Investing in Mutual Funds to grow wealth
- D) None of the above

Answer:

A

Question 8

Question Type: MultipleChoice

Section B (2 Mark)

Which of the following activities is/are a part of "Building the CRM project foundation phase "in CRM implementation?

I.	Identify people, process and technology requirements
II.	Identify critical success factors
III.	Identify stakeholders
IV.	Develop risk management plan

Options:

- A) I, II and III
- B) I, III and IV
- C) I, II and IV
- D) All of the above

Answer:

C

Question 9

Question Type: MultipleChoice

Section B (2 Mark)

If an investor determines that next year's earnings estimate is Rs2.00 per share and the company subsequently falters, the investor may not readjust the Rs2.00 figure enough to reflect the change because he or she is "anchored" to the Rs2.00 figure. This is not limited to downside adjustments---the same phenomenon occurs when companies have upside surprises

Which of the following Biases have been exhibited by the investor?

Options:

- A) Representative bias
- B) Anchoring and Adjustment Bias
- C) Framing bias
- D) Loss Aversion bias

Answer:

B

Question 10

Question Type: MultipleChoice

Section B (2 Mark)

The term "permanent establishment" includes especially:

I.	A place of management;
II.	A branch;
III.	An office;
IV.	A factory;
V.	A workshop;

Options:

- A)** I, II and III
- B)** II and III
- C)** III and IV
- D)** All of the Above

Answer:

D

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