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Question 1

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 2

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 3

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 4

Question Type: MultipleChoice

Section B (2 Mark)

In a "Pure Play" model of wealth management

Options:

- A) Wealth Management is viewed as the core business of the firm
- B) Wealth Management and investment banking are the core business of the bank
- C) Focus is on wide array of products of which private banking is one
- D) None of the above

Answer:

A

Question 5

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

Question 6

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

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