

Client Intake Form

Investment Advisory & Portfolio Optimization

1. Personal Information

Full Name *

Kareen

Age *

32

Gender *

Female

Smoker Status *

Smoker

Occupation

command agent

2. Financial Snapshot (JMD)

Annual Income (Gross) *

1440000

Monthly Expenses *

30000

Existing Savings/Investments *

100000

Total Debt (Non-Mortgage) *

0

3. Dependents (Family)

List spouse, children, or anyone relying on client's income.

Name	Relationship	Age	Needs Education Fund?	Needs Health Cover?
Neimarrah	Child <input type="button" value="▼"/>	9 <input type="text"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Name	Child <input type="button" value="▼"/>	<input type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Name	Child <input type="button" value="▼"/>	<input type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

4. Housing & Mortgage

Current Mortgage Status

Has Mortgage

Future Plans

Planning to Buy

Outstanding Amount (JMD)

10000000

Years Remaining

30

5. Financial Goals

Goal	Target Amount (JMD)	Years to Achieve	Priority
Retirement	20000000	33	High <input type="button" value="▼"/>
Education	3000000		High <input type="button" value="▼"/>
Emergency Fund	600000		High <input type="button" value="▼"/>
Other Goal...			High <input type="button" value="▼"/>

6. Risk Profile

How comfortable is the client with market fluctuations?

- Conservative:** "I hate losing money. Safety first." (Mostly Bonds/Money Market)
- Balanced:** "I want growth but some safety." (Mix of Equity/Bonds)
- Aggressive:** "I want maximum returns and can handle drops." (Mostly Equity)

7. Budget Check

Calculated Surplus (Income - Expenses)

Auto-calculated...

Recommended Premium (10-15% of Income)

Auto-calculated...

Client's Comfort Level (Monthly) *

Advisor Notes

Any health conditions, specific requests, or context...

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