

# 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?
<div>Neimarrah</div>	<div>Child</div> <div>▼</div>	<div>9</div>	<div><input checked="" type="checkbox"/></div>	<div><input checked="" type="checkbox"/></div>
<div>Name</div>	<div>Child</div> <div>▼</div>	<div></div>	<div><input type="checkbox"/></div>	<div><input checked="" type="checkbox"/></div>
<div>Name</div>	<div>Child</div> <div>▼</div>	<div></div>	<div><input type="checkbox"/></div>	<div><input checked="" type="checkbox"/></div>

4. Housing & Mortgage

Current Mortgage Status

Future Plans

☐ Has Mortgage

☒ Planning to Buy

<div>Outstanding Amount (JMD)</div>	<div>10000000</div>
<div>Years Remaining</div>	<div>30</div>

5. Financial Goals

Goal	Target Amount (JMD)	Years to Achieve	Priority
<div>Retirement</div>	<div>20000000</div>	<div>33</div>	<div>High</div> <div>▼</div>
<div>Education</div>	<div>3000000</div>	<div></div>	<div>High</div> <div>▼</div>
<div>Emergency Fund</div>	<div>600000</div>	<div></div>	<div>High</div> <div>▼</div>
<div>Other Goal...</div>	<div></div>	<div></div>	<div>High</div> <div>▼</div>

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

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### Calculated Surplus (Income - Expenses)

Auto-calculated...

### Recommended Premium (10-15% of Income)

Auto-calculated...

### Client's Comfort Level (Monthly) \*

## Advisor Notes

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

