

Arnav Kumar - Investor Profile

Name: Arnav Kumar

Age: 25

Occupation: Data Scientist

Annual Income: \$120000

Net Worth: \$100,000

Financial Goals:

Primary Goal: Retirement Savings

Secondary Goal: Children Education loan

Investment Horizon:

Short term: 1-3 years and

Long term: 4-5 years

Risk Tolerance:

High Risk Tolerance with careful investment in stocks. Comfortable with moderate market fluctuations.

Investment Preferences:

Stocks: 60% Bonds: 20% Mutual Funds: 10% Real Estate: 10%, Ethical Consideration: No drug company

Historical Investment Behavior:

Diversified Portfolio with focus on real estate. Mutual fund and ETFs with low risk is also preferable

Liquidity Needs:

Emergency funds: \$50000 in a high yield savings account

Tax Consideration:

Utilize tax-advantage accounts such as 401k and ROTH IRA