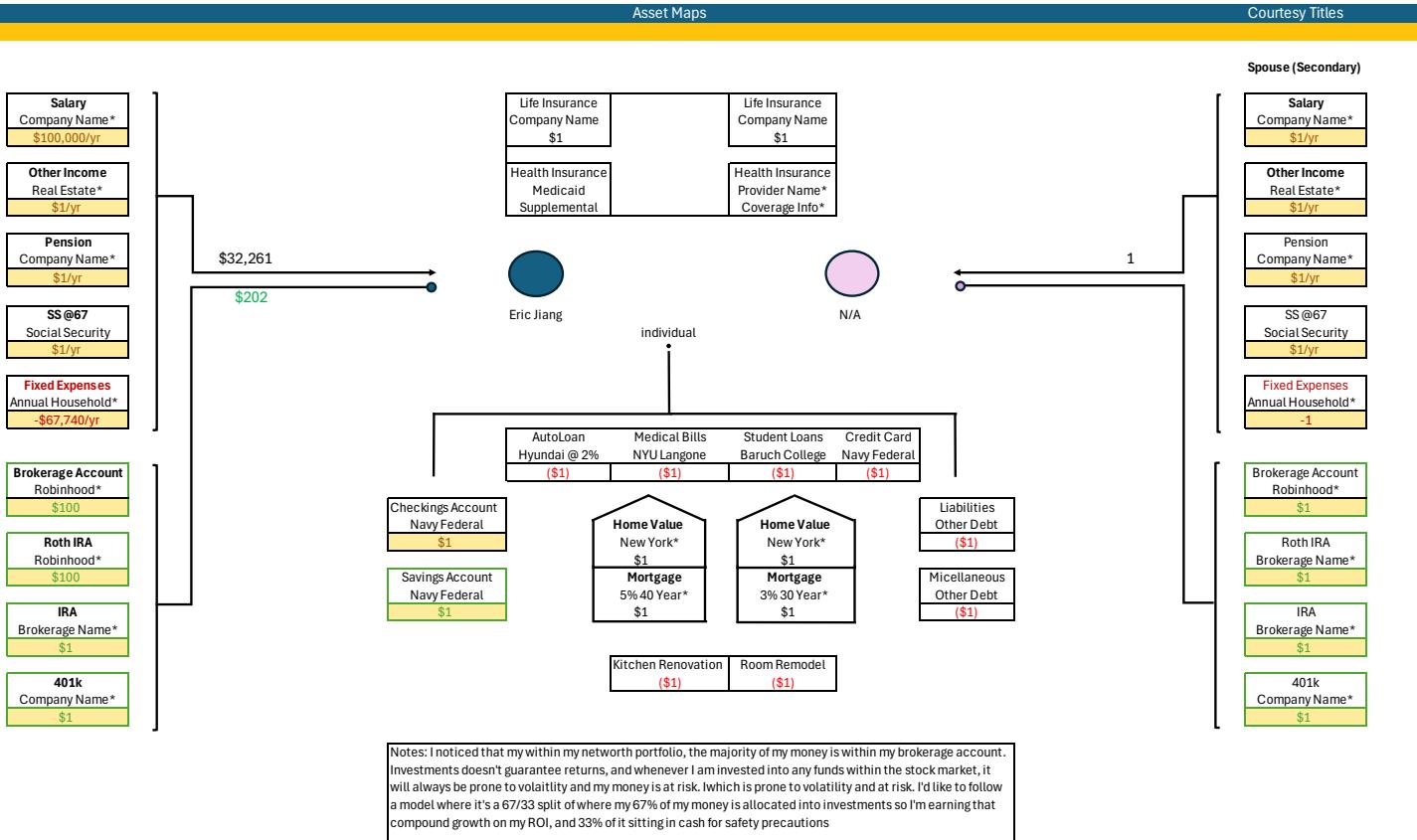
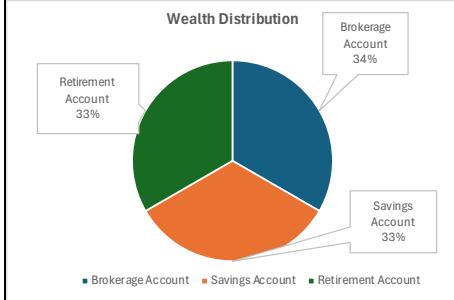


Advisor: Eric Jiang

Eric Jiang (20)
Single Individual
Primary
Personal-Email
xxx-xxx-xxxx
0 dependents
NY, US
Oct-20-2005
8/4/25

Total Investments & Savings	Client Input	Goal	% of Goal Achieved
Brokerage Account	\$100	\$1,000	10% of 100%
Savings Account	\$100	\$1,000	10% of 100%
Retirement Account	\$100	\$1,000	10% of 100%
Other Long-term Assets	\$100	\$1,000	10% of 100%
Networth Overview	\$400		



Personal Finance Snapshot

Earnings	
Salary	\$100,000
Secondary Income	\$0
Rent Income	\$0
Dividend	\$0
Bonus/Commission	\$0
Pension	\$0
Other Income 1	\$0
Other Income 2	\$0
Other Income 3	\$0
Child Care Allowance	\$0
Annual Earnings	\$100,000
Monthly Earnings	\$8,333

Expense Categories

Housing	Forecast
Rent/Mortgage	\$2,500
Electricity	\$150
Water/Sewer	\$100
Gas/Heating	\$150
Internet Services	\$50
Household repairs	\$0
Housecleaning service	\$0
Other (Housing)	\$0
Total (M)	\$2,950

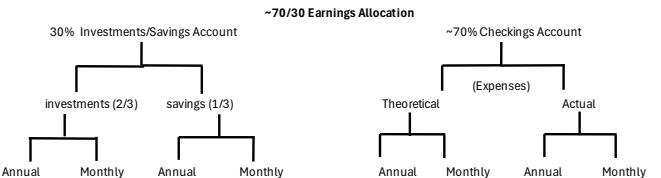
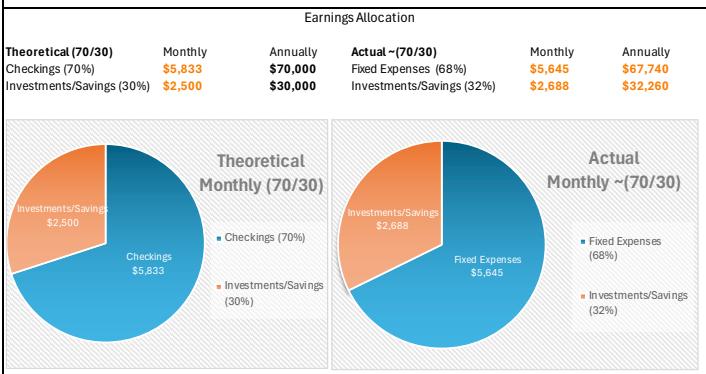
Recurring Expenses	Forecast
Phone Bill	\$20
Subscriptions	\$20
Gym Membership	\$30
Credit Cards	\$0
Health Insurance	\$400
Life Insurance	\$30
Student Loan	\$0
Other Loan Payments	\$0
Total (M)	\$500

Transportation	With Car	Without Car
Car Payment	\$500	\$0
Gas/fuel	\$100	\$0
Insurance	\$300	\$0
Maintenance	\$75	\$0
Public Transportation	\$0	\$70
Public Transportation	\$0	\$0
Total (M)		\$1,045

Daily Living	Actual	Budget
Groceries	\$700	\$800
Dining Out	\$300	\$400
Other (Food Expenses)	\$50	\$100
Child Care	\$0	\$0
Miscellaneous	\$100	\$200
Pet expenses	\$0	\$0
Travel/Trips	\$0	\$1,000
Total (M)	\$1,150	\$1,150

Financial Summary	Target	Client Input
Emergency Fund	\$33,870	\$1,500
Investments & Savings	\$32,260	\$25,000
Brokerage Account	\$21,507	\$8,000
High-Yield Savings Account	\$10,753	\$2,500
Retirement Contributions	\$1	\$200

Total Monthly Expenses \$5,645
Total Annual Expenses \$67,740
Leftover after all expense categories \$32,260



Notes:

Start by inputting your monthly fixed expenses before any hypothetical earnings allocation. The purpose of this step is to establish a comfortable, baseline standard of living. What you insert in those expense categories should not compromise or go below the means of your current level of welfare. So be REALISTIC! The benchmark is here to be transparent, which allows you to live peacefully stress-free.

We also need to build an Emergency Fund to protect ourselves against financial instability. It's not a question of *if* it will happen, but *when*. That's why the first use of any leftover income should be to fund a full 6-month emergency fund. This gives you ample time to recover in the event of job loss or other setbacks. Do not forget that prioritizing safety and stability is more paramount and should come before any investments or savings.

Once that is done, now we can proceed with the earnings allocation. Currently, I have no bills to pay, so I built this model to reflect a scenario where I live independently without receiving financial support from my family.

In my model, ~70% of my income is allocated to anticipated living costs, including rent, utilities, transportation, and daily essentials – leaving the remaining 30% for investments and savings. The actual numbers are closer to 68/32 in comparison, however, while the 2% difference might seem minor, it is treated as a flexible buffer for unexpected spendings. Personally, the 68/32 model is more practical since my financial goals are to maximize my investments and savings, so that 2% will be allocated there rather than discretionary spending.

Everyone's financial circumstances and narratives are different, whether you're aiming to hit a benchmark percentage, or simply making the commitment to direct just that extra 2% towards your financial goals, this model can be tailored to fit your needs.

At the end of the day, this framework is here to help you stay accountable, track your actual allocations, remain aware of where your money is going, and be mindful of how close you are to your short-term financial goals.

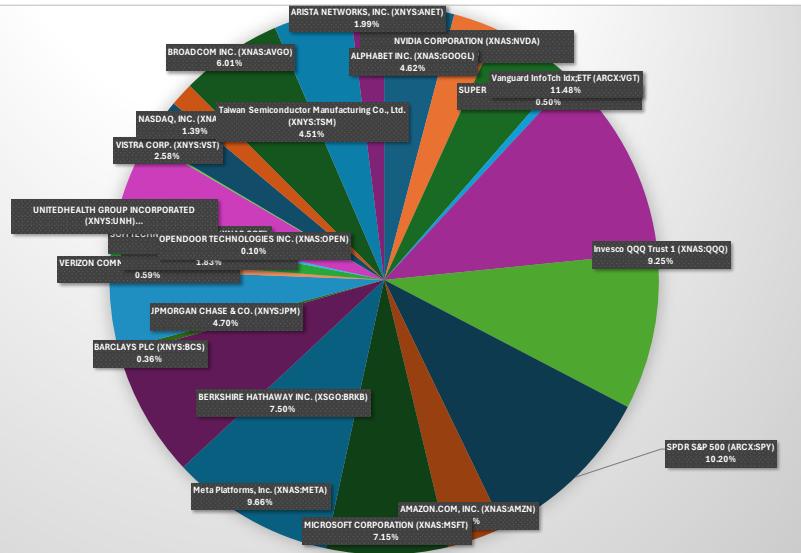
Remember: the best financial model is the one that is realistic and the one you'll actually stick with.

Financial Journal

Current Portfolio						
Portfolio Value		\$6,760.68				
Daily Gain / Loss		\$5.07				
Realized P/L (all-time)		\$1.00 (+0.01%)				
Initial Cash-Deposit		\$6,760				
Number of Holdings		Equity Value				
23		\$6,759.68				
Ticker	Symbol	Price	Average Cost	Shares	Equity	% Equity
AAPL	Apple Inc. (XNAS:AAPL)	\$278.03	\$278.03	1	\$278.03	4.11%
NVDA	NVIDIA CORPORATION (XNAS:NVDA)	\$180.93	\$180.93	1	\$180.93	2.68%
GOOGL	Alphabet Inc. (XNAS:GOOGL)	\$312.43	\$312.43	1	\$312.43	4.62%
SMCI	SUPER MICRO COMPUTER, INC. (XNAS:SMCI)	\$34.02	\$34.02	1	\$34.02	0.50%
VGT	Vanguard InfoTch Idx:ETF (ARCX:VGT)	\$776.26	\$776.26	1	\$776.26	11.48%
QQQ	Invesco QQQ Trust 1 (XNAS:QQQ)	\$625.58	\$625.58	1	\$625.58	9.25%
SPY	SPDR S&P 500 (ARCX:SPY)	\$689.17	\$689.17	1	\$689.17	10.20%
AMZN	AMAZON.COM, INC. (XNAS:AMZN)	\$230.28	\$230.28	1	\$230.28	3.41%
MSFT	MICROSOFT CORPORATION (XNAS:MSFT)	\$483.47	\$483.47	1	\$483.47	7.15%
META	Meta Platforms, Inc. (XNAS:META)	\$652.71	\$652.71	1	\$652.71	9.66%
BRK.B	BERKSHIRE HATHAWAY INC. (XSGO:BRKB)	\$506.69	\$506.69	1	\$506.69	7.50%
BCS	BARCLAYS PLC (XNYS:BCS)	\$24.19	\$24.19	1	\$24.19	0.36%
JPM	JPMORGAN CHASE & CO. (XNYS:JPM)	\$317.38	\$317.38	1	\$317.38	4.70%
VZ	VERIZON COMMUNICATIONS INC. (XNYS:VZ)	\$40.22	\$40.22	1	\$40.22	0.59%
HOOD	ROBINHOOD MARKETS, INC. (XNAS:HOOD)	\$123.38	\$123.38	1	\$123.38	1.83%
SOFI	SOFI TECHNOLOGIES, INC. (XNAS:SOFI)	\$27.07	\$27.07	1	\$27.07	0.40%
UNH	UNITEDHEALTH GROUP INCORPORATED (XNYS:UNH)	\$336.73	\$336.73	1	\$336.73	4.98%
OPEN	OPENDOO TECHNOLOGIES INC. (XNAS:OPEN)	\$7.05	\$7.05	1	\$7.05	0.10%
VST	VISTRA CORP. (XNYS:VST)	\$174.63	\$174.63	1	\$174.63	2.58%
NDAO	NASDAQ, INC. (XNAS:NDAO)	\$93.85	\$93.85	1	\$93.85	1.39%
AVGO	BROADCOM INC. (XNAS:AVGO)	\$406.37	\$406.37	1	\$406.37	6.01%
TSM	Taiwan Semiconductor Manufacturing Co., Ltd. (XNYS:TSM)	\$304.85	\$304.85	1	\$304.85	4.51%
ANET	ARISTA NETWORKS, INC. (XNYS:ANET)	\$134.39	\$134.39	1	\$134.39	1.99%
Total Return (unrealized)	\$0.00					
Realized Gain	\$1.00					

Portfolio Overview

- APPLE INC. (XNAS:AAPL)
- NVIDIA CORPORATION (XNAS:NVDA)
- ALPHABET INC. (XNAS:GOOGL)
- SUPER MICRO COMPUTER, INC. (XNAS:SMCI)
- Vanguard InfoTch Idx:ETF (ARCX:VGT)
- Invesco QQQ Trust 1 (XNAS:QQQ)
- SPDR S&P 500 (ARCX:SPY)
- AMAZON.COM, INC. (XNAS:AMZN)
- MICROSOFT CORPORATION (XNAS:MSFT)
- Meta Platforms, Inc. (XNAS:META)
- BERKSHIRE HATHAWAY INC. (XSGO:BRKB)
- BARCLAYS PLC (XNYS:BCS)
- JPMORGAN CHASE & CO. (XNYS:JPM)
- VERIZON COMMUNICATIONS INC. (XNYS:VZ)
- ROBINHOOD MARKETS, INC. (XNAS:HOOD)
- SOFI TECHNOLOGIES, INC. (XNAS:SOFI)
- UNITEDHEALTH GROUP INCORPORATED (XNYS:UNH)
- OPENDOO TECHNOLOGIES INC. (XNAS:OPEN)
- VISTRA CORP. (XNYS:VST)
- NASDAQ, INC. (XNAS:NDAO)
- BROADCOM INC. (XNAS:AVGO)
- Taiwan Semiconductor Manufacturing Co., Ltd. (XNYS:TSM)
- ARISTA NETWORKS, INC. (XNYS:ANET)



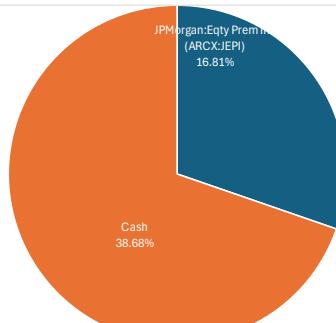
Retirement Portfolio

Roth IRA		\$343.83
Total Return		+\$20.83 (+6.45%)
Total Contribution		\$323.00

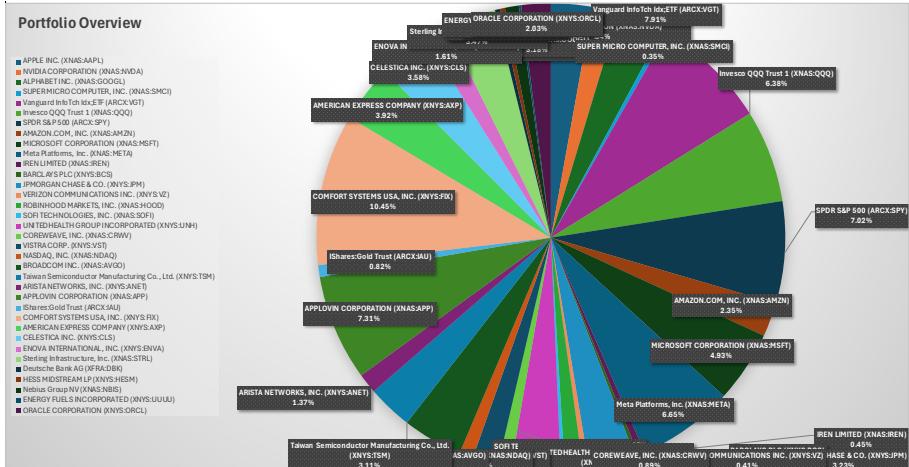
Number of Holdings	Equity Value
2	\$57.80
Ticker	Symbol
JEPI	JPMorgan:Eqy Prem Inc (ARCX:JEPI)
Cash	Cash
Total Return (unrealized)	\$20.83

Portfolio Overview

- JPMorgan:Eqy Prem Inc (ARCX:JEPI)
- Cash



Current Portfolio							
Portfolio Value		\$9,811.86					
Daily Gain / Loss		\$4.03					
Realized P&L (all-time)		\$1.00 (+0.01%)					
Initial Cash Deposit		\$9,811					
Number of Holdings		8					
Equity Value		\$9,810.86					
Ticker	Symbol	Price	Average Cost	Shares	Equity	% Equity	+/- Return
AAPL	(NASDAQ:AAPL)	\$278.03	\$278.03	1	\$278.03	2.83%	\$0.00 (+0.00%)
NVDA	(NASDAQ:NVDA)	\$180.93	\$180.93	1	\$180.93	1.84%	\$0.00 (+0.00%)
GOOGL	(NASDAQ:GOOGL)	\$312.43	\$312.43	1	\$312.43	3.18%	\$0.00 (+0.00%)
SMCI	(NASDAQ:SMCI)	\$34.02	\$34.02	1	\$34.02	0.35%	\$0.00 (+0.00%)
VGT	(ARCX:VGT)	\$775.26	\$775.26	1	\$775.26	7.91%	\$0.00 (+0.00%)
QQQ	(NASDAQ:QQQ)	\$869.17	\$869.17	1	\$869.17	8.69%	\$0.00 (+0.00%)
SPY	(ARCX:SPY)	\$869.17	\$869.17	1	\$869.17	8.69%	\$0.00 (+0.00%)
AMZN	(NASDAQ:AMZN)	\$230.28	\$230.28	1	\$230.28	2.35%	\$0.00 (+0.00%)
MSFT	(NASDAQ:MSFT)	\$483.47	\$483.47	1	\$483.47	4.93%	\$0.00 (+0.00%)
META	(NASDAQ:META)	\$652.71	\$652.71	1	\$652.71	6.65%	\$0.00 (+0.00%)
IREN	(NASDAQ:IREN)	\$43.94	\$43.94	1	\$43.94	0.45%	\$0.00 (+0.00%)
BCS	(NYSE:BCS)	\$24.19	\$24.19	1	\$24.19	0.25%	\$0.00 (+0.00%)
JPM	(NYSE:JPM)	\$317.38	\$317.38	1	\$317.38	3.23%	\$0.00 (+0.00%)
VZ	(NYSE:VZ)	\$40.22	\$40.22	1	\$40.22	0.41%	\$0.00 (+0.00%)
HOOD	(NASDAQ:HOOD)	\$123.38	\$123.38	1	\$123.38	1.26%	\$0.00 (+0.00%)
SOFI	(NASDAQ:SOFI)	\$22.07	\$22.07	1	\$22.07	0.23%	\$0.00 (+0.00%)
UNH	(NYSE:UNH)	\$393.73	\$393.73	1	\$393.73	4.43%	\$0.00 (+0.00%)
CRWV	(NASDAQ:CRWV)	\$87.38	\$87.38	1	\$87.38	0.89%	\$0.00 (+0.00%)
VST	(NYSE:VST)	\$174.63	\$174.63	1	\$174.63	1.78%	\$0.00 (+0.00%)
NDAO	(NASDAQ:NDAO)	\$93.85	\$93.85	1	\$93.85	0.96%	\$0.00 (+0.00%)
AVGO	(NASDAQ:AVGO)	\$406.37	\$406.37	1	\$406.37	4.14%	\$0.00 (+0.00%)
TSM	(NYSE:TSM)	\$304.85	\$304.85	1	\$304.85	3.11%	\$0.00 (+0.00%)
ANET	(NYSE:ANET)	\$134.39	\$134.39	1	\$134.39	1.37%	\$0.00 (+0.00%)
APP	(NASDAQ:APP)	\$716.98	\$716.98	1	\$716.98	7.31%	\$0.00 (+0.00%)
IAU	(ARCX:IAU)	\$80.53	\$80.53	1	\$80.53	0.82%	\$0.00 (+0.00%)
FXE	(ARCX:FXE)	\$102.02	\$102.02	1	\$102.02	10.02%	\$0.00 (+0.00%)
AVP	(NYSE:AVP)	\$384.89	\$384.89	1	\$384.89	3.92%	\$0.00 (+0.00%)
CLS	(NASDAQ:CLS)	\$351.62	\$351.62	1	\$351.62	3.58%	\$0.00 (+0.00%)
ENVA	(NYSE:ENVA)	\$157.92	\$157.92	1	\$157.92	1.61%	\$0.00 (+0.00%)
STRL	(NYSE:STRL)	\$340.51	\$340.51	1	\$340.51	3.47%	\$0.00 (+0.00%)
DBK	(XFA:DBK)	\$32.83	\$32.83	1	\$32.83	0.33%	\$0.00 (+0.00%)
HESM	(NYSE:HESM)	\$34.45	\$34.45	1	\$34.45	0.35%	\$0.00 (+0.00%)
NBIS	(NASDAQ:NBIS)	\$94.26	\$94.26	1	\$94.26	0.96%	\$0.00 (+0.00%)
UUUU	(NYSE:UUUU)	\$15.82	\$15.82	1	\$15.82	0.16%	\$0.00 (+0.00%)
ORCL	(NYSE:ORCL)	\$196.85	\$196.85	1	\$196.85	2.03%	\$0.00 (+0.00%)
Total Return (unrealized)	\$0.00						
Realized Gain	\$1.00						



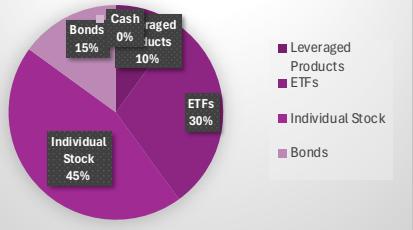
Portfolio Model

Sample Portfolio Model

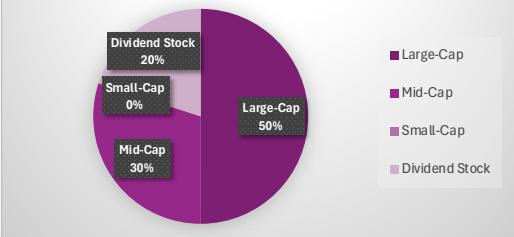
Category	% Holding
Leveraged Products	10%
ETFs	30%
Individual Stock	45%
Bonds	15%
Cash	0%

Individual Stock	% Holding	Portfolio % Weight
Large-Cap	50%	23%
Mid-Cap	30%	14%
Small-Cap	0%	0%
Dividend Stock	20%	9%

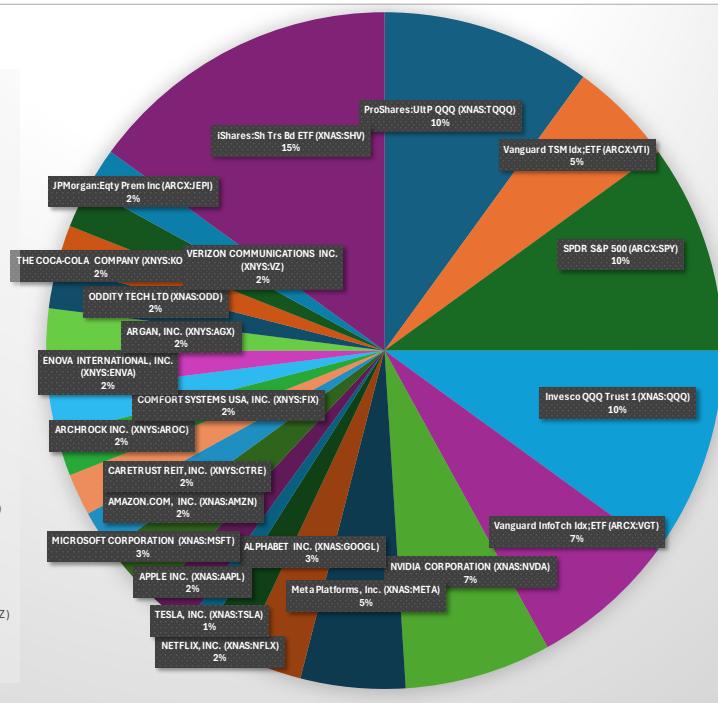
Sample Portfolio Model



Individual Stock Allocation



Portfolio Model



STOCK	TICKER	Avg. Vol	Volume	Beta	PE ratio	Open	High	Low	Prev. Close	Price	% Change	Change	52-Wk High	52-Wk low	Market Cap
SPDR S&P 500 (ARCX:SPY)	SPY	79,053,665	86,173,678	1.00		\$685.14	\$689.25	\$682.17	\$687.57	\$689.17	0.23%	\$1.60	\$689.70	\$481.80	700,622M
Invesco QQQ Trust 1 (XNAS:QQQ)	QQQ	60,259,973	58,272,844	1.03		\$623.82	\$625.78	\$617.72	\$627.61	\$625.58	-0.32%	(\$2.03)	\$637.01	\$402.39	403,023M
Vanguard InfoTch Idx ETF (ARCX:VGT)	VGT	566,525	545,763	0.99		\$771.65	\$776.79	\$761.64	\$779.16	\$776.26	-0.37%	(\$2.90)	\$806.99	\$451.00	112,035M
NASDAQ, INC. (XNAS:NDAQ)	NDAQ	2,892,196	5,554,598	1.03		\$92.21	\$94.38	\$91.92	\$91.92	\$93.85	2.10%	\$1.93	\$97.63	\$64.84	53,588M
CBOE MKT VOLATILITY IDX	VIX	—	—	—		\$16.84	\$16.88	\$14.85	\$15.77	\$14.85	-5.83%	(\$0.92)	\$60.13	\$13.24	—
Vanguard TSM Idx ETF (ARCX:VTI)	VTI	3,717,243	3,818,952	1.00		\$337.88	\$339.94	\$336.44	\$338.73	\$339.85	0.33%	\$1.12	\$339.94	\$236.42	567,352M
APPLE INC. (XNAS:AAPL)	AAPL	44,664,122	33,247,986	1.09		\$279.10	\$279.59	\$273.81	\$278.78	\$278.03	-0.27%	(\$0.75)	\$288.62	\$169.21	4,108,269M
NVIDIA CORPORATION (XNAS:NVDA)	NVDA	206,003,277	182,136,641	2.32		\$180.28	\$181.32	\$176.62	\$183.78	\$180.93	-1.55%	(\$2.85)	\$212.19	\$86.62	4,396,599M
MICROSOFT CORPORATION (XNAS:MSFT)	MSFT	25,265,373	24,669,180	1.07		\$476.63	\$486.03	\$475.86	\$478.56	\$483.47	1.03%	\$4.91	\$555.45	\$344.79	3,593,331M
NETFLIX, INC. (XNAS:NFLX)	NFLX	45,790,886	43,949,009	1.71		\$93.90	\$94.82	\$92.76	\$92.71	\$94.09	1.49%	\$1.38	\$134.12	\$82.11	429,944M
Meta Platforms, Inc. (XNAS:META)	META	19,436,134	13,056,726	1.29		\$643.29	\$655.28	\$640.80	\$650.13	\$652.71	0.40%	\$2.58	\$796.25	\$479.80	1,645,174M
AMAZON.COM, INC. (XNAS:AMZN)	AMZN	42,294,615	28,249,599	1.38		\$230.71	\$232.11	\$228.69	\$231.78	\$230.28	-0.65%	(\$1.50)	\$258.60	\$161.38	2,477,778M
ALPHABET INC. (XNAS:GOOG)	GOOG	26,979,641	25,912,059	1.08		\$321.10	\$321.99	\$309.88	\$321.00	\$313.70	-2.27%	(\$7.30)	\$328.67	\$142.66	3,868,246M
TESLA, INC. (XNAS:TSLA)	TSLA	79,739,621	55,979,492	1.84		\$448.95	\$449.27	\$440.33	\$451.45	\$446.89	-1.01%	(\$4.56)	\$488.54	\$214.25	1,486,275M
ROBINHOOD MARKETS, INC. (XNAS:HOOD)	HOOD	29,671,658	44,624,831	2.43		\$131.78	\$131.78	\$122.53	\$135.66	\$123.38	-9.05%	(\$12.28)	\$153.86	\$29.66	121,984M
SUPER MICRO COMPUTER, INC. (XNAS:SMCI)	SMCI	26,480,376	23,178,866	1.51		\$34.15	\$34.16	\$32.91	\$34.90	\$34.02	-2.52%	(\$0.88)	\$66.44	\$25.71	20,309M
REDDIT INC. (XNYS:RDDT)	RDDT	4,273,358	4,386,042	2.36		\$235.54	\$238.00	\$227.30	\$238.11	\$233.54	-1.92%	(\$4.57)	\$282.95	\$79.75	44,255M
PALANTIR TECHNOLOGIES INC. (XNAS:PLTR)	PLTR	50,289,333	36,843,184	1.54		\$184.80	\$188.05	\$180.21	\$187.91	\$187.54	-0.20%	(\$0.37)	\$207.52	\$63.40	446,801M
COSTCO WHOLESALE CORPORATION (XNAS:COST)	COST	2,508,964	3,041,582	1.01		\$875.86	\$886.00	\$872.55	\$874.41	\$884.48	1.15%	\$10.07	\$1,078.24	\$871.09	392,672M
JPMORGAN CHASE & CO. (XNYS:JPM)	JPM	8,774,510	9,721,859	1.07		\$309.24	\$318.00	\$309.24	\$310.11	\$317.38	2.34%	\$7.27	\$322.25	\$202.16	872,717M
BERKSHIRE HATHAWAY INC. (XNYS:BRK.B)	BRK.B	5,164,551	4,493,445	0.71		\$491.83	\$498.15	\$491.83	\$490.43	\$495.85	1.11%	\$5.42	\$542.07	\$440.10	1,057,829M
SOFI TECHNOLOGIES, INC. (XNAS:SOFI)	SOFI	73,338,604	42,165,647	1.92		\$26.84	\$27.28	\$26.56	\$27.09	\$27.07	-0.70%	(\$0.02)	\$32.73	\$8.60	34,146M
BARCLAYS PLC (XNYS:BCS)	BCS	5,546,319	6,196,835	0.99		\$23.95	\$24.22	\$23.93	\$23.82	\$24.19	1.55%	\$0.37	\$24.22	\$12.14	81,681M
VERIZON COMMUNICATIONS INC. (XNYS:VZ)	VZ	25,901,622	21,894,995	0.33		\$40.00	\$40.55	\$39.97	\$39.92	\$40.22	0.75%	\$0.30	\$47.36	\$37.59	169,585M
UNITEDHEALTH GROUP INCORPORATED (XNYS:UNH)	UNH	7,520,330	7,513,165	0.43		\$330.37	\$339.25	\$328.76	\$328.37	\$336.73	2.55%	\$8.36	\$606.36	\$234.60	305,023M
OPENDOOR TECHNOLOGIES INC. (XNAS:OPEN)	OPEN	127,491,247	60,839,785	3.63		\$7.05	\$7.17	\$6.73	\$7.00	\$7.05	0.71%	\$0.05	\$10.87	\$0.51	6,724M
VISTRA CORP. (XNYS:VST)	VST	4,215,181	6,197,091	1.41		\$162.05	\$174.89	\$161.01	\$165.17	\$174.63	5.73%	\$9.46	\$219.82	\$90.51	59,169M
BROADCOM INC. (XNAS:AVGO)	AVGO	23,172,561	45,681,617	1.20		\$404.83	\$409.30	\$394.19	\$412.97	\$406.37	-1.60%	(\$6.60)	\$414.61	\$138.10	1,919,027M
Taiwan Semiconductor Manufacturing Co., Ltd. (XNYS:TSM)	TSM	11,748,747	15,028,375	1.29		\$305.32	\$305.84	\$299.64	\$309.34	\$304.85	-1.45%	(\$4.49)	\$313.98	\$134.25	1,253,886M
ARISTA NETWORKS, INC. (XNYS:ANET)	ANET	8,736,723	6,679,540	1.41		\$135.53	\$136.40	\$128.95	\$132.36	\$134.39	1.53%	\$2.03	\$164.94	\$59.43	169,235M
THE COCA-COLA COMPANY (XNYS:KO)	KO	17,121,790	23,124,157	0.38		\$70.55	\$70.69	\$68.79	\$70.21	\$69.11	-1.57%	(\$1.10)	\$74.38	\$60.62	297,284M
VERIZON COMMUNICATIONS INC. (XNYS:VZ)	VZ	25,901,622	21,894,995	0.33		\$40.00	\$40.55	\$39.97	\$39.92	\$40.22	0.75%	\$0.30	\$47.36	\$37.59	169,585M
JPMorgan Eqty Prem Inc (ARCX:JEPI)	JEPI	5,009,311	4,011,136	0.51		\$57.38	\$57.80	\$57.38	\$57.41	\$57.80	0.68%	(\$0.39)	\$59.86	\$49.94	41,517M

Client Profile

Fill out the form below prior to your consultation. Providing this information will help your advisor better understand your financial situation and goals.

Advisor: LCPL JIANG

Personal Information

First Name

Last Name

Date Of Birth

Age

Address

Street Address, City, State/Province, Zip Code (optional)

Phone Number

Email Address

Occupation/Employer

(optional but useful context)

Martial Status/Dependents

Account Information

Account Holder

(circle one)

Primary

Secondary

Account Type

(circle one)

Joint (married)

Joint (other)

Single (individual)

Custodial

Investment Profile

Investment Experience

(circle one)

None

Beginner

Moderate

Expert

Professional

<1 year

1-3 years

3-5 years+

Experience

Investment Objectives

(circle one)

Growth

Income

Preservation

Speculation

Investment Risk Tolerance

(circle one)

Low-Risk

Medium-Risk

high risk high reward baby!!!!!!

YOLO ^_(ツ)_/^-

Investment Horizon

(circle one)

Short-term

Medium-term

Long-term

<3 years

3-5 years

10+ years

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(circle one)

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(circle one)

Growth

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high risk high reward baby!!

YOLO ^_(ツ)_/^-

Investment Horizon

(circle one)

Short-term

Medium-term

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3-5 years

10+ years

Pre-consultation Notes

Goals, Financial Planning (long & short term), Financial Advice, Budgeting, Spending, Trips, Financial Circ

:umstances, Questions?