

CONTACT DETAILS

Name

vivek

Address:

test address here

Phone

8625452635

Best time(s) to schedule free consultation

csdass

GOALS DETAILS

Services you may be interested in

Comments regarding your goals for this consultation:

Comments regarding your goals for this consultation

Specific questions/topics you would like to address

Specific questions/topics you would like to address

PERSONAL DETAILS

Age

22

Married

No

Kids

1

Grand Kids

2

Pets

2

Other relevant details

dfdf

ASSETS DETAILS

Types of assets:

Home value

\$2,525.00

Mortgage

\$0.00

Approx. equity

\$2,525.00

Monthly rent

☒ I/we rent

\$254,458.00

Estimated value in accounts

☒ Banking

\$4,554.00

☒ Brokerage (taxable)

\$454.00

☒ Retirement accounts

\$54,654,654.00

☒ Roth accounts

\$0.00

☒ Other

tr \$45,454.00

Approx. asset total

\$54,659,662.00

Income:

Total annual income

☒ Social security

\$12,500.00

☒ Pension(s)

\$3,000.00

Other

Assets test

BUDGET DETAILS (ANNUAL SPENDING)

Essential spending (bare minimum spending requirement)

\$2,500.00

Discretionary

\$1,200.00

Approx. total:

\$3,700.00

Expected trend for expenses & one-off expenses/label>

Expected trend for expenses & one-off expenses

INSURANCE DETAILS

☒ I/we have no insurance

☒ Life insurance

Other

inother

Type

Whole life

Amount

\$2,500.00

INVESTING DETAILS

Investment experience (1= novice / 10 = expert)

4

☒ I am/we are very analytical (regardless of investment experience)

Performance expectations

Expectations

Notable investment experiences (good and/or bad)

Experiences (good & bad)

Investment performance goals (tick all that apply)

☒ Growth (willing to accept higher volatility for higher returns)

☒ Aggressive growth (returns are top priority and significant volatility is acceptable)

Current allocation to stocks and other risky assets

25%

RISK DETAILS

How do you view your risk tolerance?

- ☒ Aggressive (healthy appetite for risk)
- ☒ Moderate (seek more balanced risk)
- ☒ Conservative (generally prefer less risk)

Assuming your financial security would not be compromised, what is the maximum portfolio drawdown (decrease) you could tolerate?

50% - very aggressive

Please score the importance of each factor:

Preservation

2

Income

3

Growth

4

How did you and your portfolio hold up during the last major market downturn (e.g., the credit crisis in 2008)?

How did you and your portfolio hold up during the last major market downturn (e.g., the credit crisis in 2008)?

Please look at the example portfolios below and select the one with the most appealing risk-return profile over this hypothetical 10-year period.

☒ Portfolio 3

☒ Portfolio 4



OTHER DETAILS

How did you discover SET IT AND LEAVE IT?

Referral

\$0.00

Other

\$0.00

What attracted you to SET IT AND LEAVE IT?

What attracted you to SET IT AND LEAVE IT?

We welcome suggestions to help us improve this questionnaire:

nothing