CONTACT DETAILS

Name

shruti123

Address:

tilak marg

Phone

(555) 555 - 5555

Best time(s) to schedule free consultation

444

GOALS DETAILS

Services you may be interested in

Comments regarding your goals for this consultation:

Specific questions/topics you would like to address

PERSONAL DETAILS

Age

Married

Kids

Grand Kids

Pets

Other relevant details

ASSETS DETAILS

Types of assets:

Home value	Mortgage	Approx. equity
$0.00	$0.00	$0.00

Monthly rent

$0.00

Estimated value in accounts

$0.00

$0.00

$0.00

$0.00

$0.00

Approx. asset total $0.00

Income:

Total annual income

$0.00

$0.00

Other

Essential spending (bare minimum spending requirement)

$0.00

Discretionary

$0.00

Approx. total:

$0.00

Expected trend for expenses & one-off expenses

Type	Amount
	$0.00
Other	

INVESTING DETAILS

Investment experience (1= novice / 10 = expert)

Performance expectations

Notable investment experiences (good and/or bad)

Investment performance goals (tick all that apply)
Current allocation to stocks and other risky assets

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

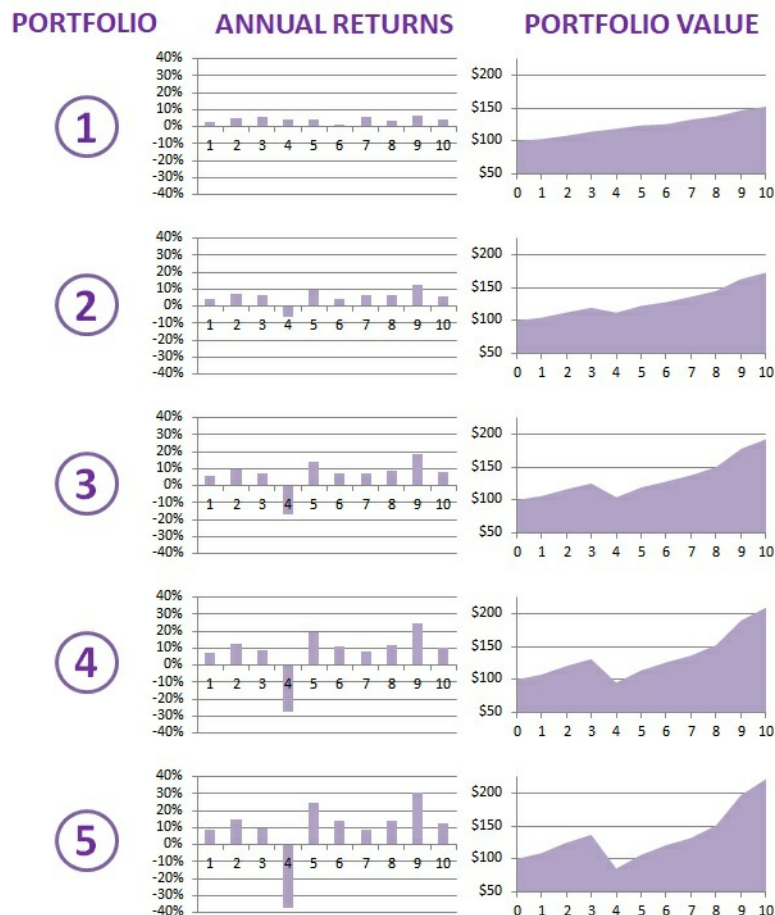Please score the importance of each factor:
Preservation

Income

Growth

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

Portfolio	1	2	3	4	5
Starting value	$100	$100	$100	$100	$100
Ending value	$152	$174	$195	$214	$228
Annualized return	4%	6%	7%	8%	9%
Volatility	2%	5%	9%	14%	18%
Worst year	1%	-6%	-17%	-27%	-37%

this hypothetical 10-year period.

How did you discover SET IT AND LEAVE IT?

Referral22222222

$0.00

Other

$0.00

What attracted you to SET IT AND LEAVE IT?

We welcome suggestions to help us improve this questionnaire: