Client Information

Client Name

judth masoni

Client Address

Add client address to client model

Client Email

j@j

Recommended Portfolio

Risk Model:1

Approximate Account Size

Add how much a client wants to have?

Account Type

Add type of account

Taxable Account

Well is it a taxable account?

Advisor Information

Advisor Name

jamie

Firm Name

Makes a Lot of Money

Advisor Address

Add Advisor Address

Advisor Phone

87656

Advisor Email

j@m