

Magnus Client Intake Form

Personal Information

Full Name: Muhangiiiiii
Date of Birth: 06/12/1995
Social Security Number: 112425346457
Citizenship: US Citizen
Marital Status: Married

Contact Information

Residential Address: 13242333
Email: eliodcuae@gmail.com
Home Phone: 078048756
Mobile Phone: 078048756
Work Phone: 078048756

Employment Information

Employment Status: Self-Employed
Employer Name: swanda moses
Occupation: developer
Years Employed: 20
Annual Income: 450
Employer Address: [Not provided]

Financial Information

Education Status: High School
Estimated Tax Bracket: 0
Investment Risk Tolerance: Conservative
Investment Objectives: i dont know
Net Worth (excluding primary home): 6000
Liquid Net Worth: 2000
Assets Held Away:

Dependents

Dependent 1:
Name: mutiba muhangi
Date of Birth: 12/12/2015
Relationship:

Beneficiaries

Beneficiary 1:

Name: scidddo

Date of Birth: 06/12/2015

Relationship:

Percentage: [Not provided]

Asset Breakdown

Stocks: 6%

Bonds: [Not provided]

Mutual Funds: 55%

ETFs: [Not provided]

Options: [Not provided]

Futures: [Not provided]

Short-Term: [Not provided]

Other: [Not provided]

Investment Experience

Stocks:

Year Started: [Not provided]

Experience Level: [Not provided]

Bonds:

Year Started: [Not provided]

Experience Level: [Not provided]

Mutual Funds:

Year Started: [Not provided]

Experience Level: [Not provided]

ETFs:

Year Started: [Not provided]

Experience Level: [Not provided]

Options:

Year Started: [Not provided]

Experience Level: [Not provided]

Futures:

Year Started: [Not provided]

Experience Level: [Not provided]

Outside Broker Information

Broker Firm Name: [Not provided]

Account Number: [Not provided]

Account Type: [Not provided]

Trusted Contact Information

Full Name: moses kiti

Relationship: brother

Phone Number:

Email Address: moses@gmail.com

Regulatory Consent

Electronic Delivery Consent: Yes