

# Magnus Client Intake Form

## Personal Information

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

## 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: muhangi  
Occupation: developer  
Years Employed: 20  
Annual Income: \$450

## Financial Information

Education Status: High School  
Estimated Tax Bracket: 15%-32%  
Investment Risk Tolerance: Conservative  
Investment Purpose:

- Growth and Income

Investment Objectives:

- Trading Profits: 1
- Speculation: 3
- Capital Appreciation: 3
- Income: 3
- Preservation of Capital: 3

Net Worth: \$5,000  
Liquid Net Worth: \$4,600  
Assets Held Away: \$2,000

## Spouse Information

Full Name: JOan  
Date of Birth: 06/12/1997  
Social Security Number: 1239124  
Employment Status: Retired  
Employer Name: 45555555  
Occupation: developer

## Dependents

Dependent 1:  
Name: Muhangi Elioda  
Date of Birth: 05/12/2015  
Relationship: sister  
Dependent 2:  
Name:  
Date of Birth: 06/12/2015  
Relationship:

## Beneficiaries

Beneficiary 1:  
Name: Douglas  
Date of Birth: 12/12/2015  
Relationship: brother  
Percentage: 48%

## Asset Breakdown

Stocks: 4%  
Bonds: 0%  
Mutual Funds: 0%  
ETFs: 6%  
UITs: 0%  
Annuities (Fixed): 0%  
Annuities (Variable): 0%  
Options: 0%  
Commodities: 0%  
Alternative Investments: 4%  
Limited Partnerships: 0%  
Variable Contracts: 7%  
Short-Term: 0%  
Other: 0%

## Investment Experience

Stocks:

Year Started: [Not provided]

Experience Level: [Not provided]

Bonds:

Year Started: 20002

Experience Level: Limited

Mutual Funds:

Year Started: 2004

Experience Level: Limited

UITs:

Year Started: [Not provided]

Experience Level: [Not provided]

Annuities (Fixed):

Year Started: 2003

Experience Level: Limited

Annuities (Variable):

Year Started: [Not provided]

Experience Level: [Not provided]

Options:

Year Started: [Not provided]

Experience Level: [Not provided]

Commodities:

Year Started: 2003

Experience Level: [Not provided]

Alternative Investments:

Year Started: [Not provided]

Experience Level: [Not provided]

Limited Partnerships:

Year Started: [Not provided]

Experience Level: [Not provided]

Variable Contracts:

Year Started: [Not provided]

Experience Level: Extensive

## **Outside Broker Information**

Broker Firm Name: teraia

Account Type: Roth IRA

Account Number: 4400

Liquid Amount: \$20,000

## **Trusted Contact Information**

Full Name: kagutaaa

Relationship: brother

Phone Number: 0780457656784

Email Address: eliodcurry@gmail.com

## **Regulatory Consent**

Electronic Delivery Consent: Yes