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: eliodcuee@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 (Ranked 1-5):

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

# 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: [Not provided]

Mutual Funds: [Not provided]

ETFs: 6%

UITs: [Not provided]

Annuities (Fixed): [Not provided]

Annuities (Variable): [Not provided]

Options: [Not provided]

Commodities: [Not provided]

Alternative Investments: 4%

Limited Partnerships: [Not provided]

Variable Contracts: 7%

Short-Term: [Not provided]

Other: [Not provided]

# 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: brothrer

Phone Number: 0780457656784

Email Address: eliodcurry@gmail.com

# Regulatory Consent

Electronic Delivery Consent: Yes