Magnus Client Intake Form Draft

trusted\_full\_name: moses kiti

trusted\_relationship: brother

trusted\_phone:

trusted\_email: moses@gmail.com

net\_worth: 6000

liquid\_net\_worth: 2000

assets\_held\_away:

include\_breakdown: True

asset\_breakdown\_stocks: 6

qt\_spinbox\_lineedit: 0

asset\_breakdown\_bonds: 0

asset\_breakdown\_mutual\_funds: 55

asset\_breakdown\_etfs: 0

asset\_breakdown\_options: 0

asset\_breakdown\_futures: 0

asset\_breakdown\_short-term: 0

asset\_breakdown\_other: 0

asset\_experience\_stocks\_year:

asset\_experience\_stocks\_level:

asset\_experience\_bonds\_year:

asset\_experience\_bonds\_level:

asset\_experience\_mutual\_funds\_year:

asset\_experience\_mutual\_funds\_level:

asset\_experience\_etfs\_year:

asset\_experience\_etfs\_level:

asset\_experience\_options\_year:

asset\_experience\_options\_level:

asset\_experience\_futures\_year:

asset\_experience\_futures\_level:

has\_outside\_broker: True

outside\_firm\_name:

outside\_liquid\_amount:

spouse\_applicable: False

spouse\_full\_name: shillah

spouse\_dob: 06/12/1995

spouse\_ssn: 3453346346

spouse\_employment\_status: Retired

spouse\_employer\_name: recheall

spouse\_occupation: develoers

education\_status: High School

tax\_bracket: 0

risk\_tolerance: Conservative

investment\_objectives: i dont know

employment\_status: Self-Employed

employer\_name: swanda moses

occupation: developer

years\_employed: 20

annual\_income: 450

former\_employer:

income\_source:

residential\_address: 13242333

email: eliodcuee@gmail.com

home\_phone: 078048756

mobile\_phone: 078048756

work\_phone: 078048756

full\_name: Muhangiiiiii

dob: 06/12/1995

ssn: 112425346457

citizenship: US Citizen

marital\_status: Married

dependent\_name\_0: mutiba muhangi

dependent\_dob\_0: 12/12/2015

dependent\_relationship\_0:

electronic\_regulatory\_yes: True

electronic\_regulatory\_no: True

dependents: [{'name': 'mutiba muhangi', 'dob': '12/12/2015', 'relationship': ''}]

beneficiaries: [{'name': 'scidddo', 'dob': '06/12/2015', 'relationship': '', 'percentage': 0}]

beneficiary\_name\_0: scidddo

beneficiary\_dob\_0: 06/12/2015

beneficiary\_relationship\_0:

beneficiary\_percentage\_0: 0