Observe the table below. You will find some sample questions filled for the entities using the 5Ws + HOW framework. Fill in the questions with blanks ----? with suitable questions that you would ask to know the situation better.

**Questions**

|  | **Client/Prospect** | **Investment fund** | **Securities** | **Investment horizon** | **Financial goals** |
| --- | --- | --- | --- | --- | --- |
| **Who?** | Who is the investor assigned to you? | ---------? | Who are the securities client is comfortable with? | ---------? | ---------? |
| **What?** | What is clients risk appetite? | What are the total funds that the client is willing to invest? | What are different security options preferred by client? | ---------? | What is the financial goal of investor? |
| **When?** | When will be the client satisfied with investments/returns? | When will be investment fund be available immediately or systematically increment in future? | ---------? | When does the client intend to withdraw the returns? | When does the client want to start the NGO after withdrawal or want to withdraw systematically? |
| **Which?** | Which are the clients moral about investment? Does she prefer certain industries n moral ground? | Which are the sources for investment fund? Will there be continues investment in future? | Which of the securities will provide the best returns? | ---------? | Which are expected return to satisfy financial goal? |
| **Where?** | Where would be client residing during investment period? Will there be preference for investment in birth country? | ---------? | Where does the client wish to invest the available funds? | ---------? | Where does the client wish to withdraw returns in current account or into trust of NGO? |
| **How?** | How the client sees her investment? Does her life relies on it or its just a side hustle for her? | How the investment funds can be divided? Is there preference like certain % can be in riskier securities. Certain % should be in cash, or gold or other secure funds | ---------? | How the client wish to withdraw returns? | How does the individual intend to use the returns from the investment? |

Complete the document with the relevant questions. You must provide an answer to each question using the information provided about the investor and the available securities in the videos.

1. Who is the investor assigned to you?

 Ms Alexandra Kolishnyick (aka Alexa) is a daughter of Ukrainian business tycoon. An Ivy league college student. Good with academics.

1. What is clients risk appetite?

The client is conservative in nature. She want good returns but not risky securities.

1. What is the financial goal of investor?

She wants to form an NGO to work in African Saharan region.

1. When will be the client satisfied with investments/returns?

Decent returns over less risky securities.

1. When will be investment fund be available immediately or systematically increment in future?

She has stopped accepting money from parents and currently pursuing her bachelorette degree so we can assume that investments are what currently present are.

1. When does the client intend to withdraw the returns?

After her graduation.

1. Where would be client residing during investment period?

In US.

1. How does the individual intend to use the returns from the investment?

For a noble cause , to start an NGO.

**Answers**