



T h e S w i s s G u a r d S o l u t i o n s

Personal Investment Profile

This form is decisive in helping us to determine the investments best-suited to your personal needs and will allow us to formulate a clearly-structured investment proposal. All information will be treated confidentially.

PERSONAL DATA

Name _____ Address _____
City _____ State _____ Zip Code _____
Country _____ Office Tel. _____ Office Fax _____
E-mail _____ Home Tel. _____ Home Fax _____
Date of Birth _____ Profession _____

PROFILE

1. **Your age:** under 40 40 to 60 over 60

2. **Your investment time horizon:** These funds will form, in part or in whole, your:
 long-term portfolio (10 years plus) medium-term portfolio (5 to 9 years) short-term portfolio (2 to 4 years)

3. **Your annual earnings (in USD)**
 up to \$100,000 \$100,000 to \$250,000 over \$250,000

4. **Your total net assets (exclusive of home):** Approximately _____

5. **Your income requirements:** What type of withdrawals will you be making on your investment?
 lump sum (i.e. for education, car, vacation) annuity (for income) in ____ year(s)

6. **Your risk tolerance:** During times of turbulent markets (i.e. recession, correction), are you able to accept a temporary loss of...
 5% 10% 20%?

7. **Your economic optimism:** Do you think the economy is picking up steam or running out of it? How optimistic are you on the long-term prospects of the following?

	World Economy	Technology Sector	Emerging Markets	Small to Mid-Cap
Not optimistic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Average	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Very optimistic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

8. **Special interests:** Are you interested in any of the following features?
 Portfolio Management 3rd party Management / Self-management US Tax-deferral
 Asset Protection Other

9. **Restrictions:** If you wish to put any restrictions on your investments, please indicate them.

