



General Suitability Form

Please complete all fields below. Currency fields should follow the format: amount CUR (e.g. 150000.00 USD).

Annual Income

e.g. 150000.00 USD

Estimated Net Worth

e.g. 850000.00 USD

Investable Liquid Assets

e.g. 300000.00 USD

Tax Bracket (%)

0 - 100

Account Funding Source

Annual Expenses

e.g. 90000.00 USD

Special Expenses

e.g. 25000.00 USD

Timeframe

Timeframe for special expenses

Investment Purpose

Investment Objectives

Risk Tolerance

Risk tolerance score

General Investment Knowledge