

## Finance Survey form

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Germantown, MD 20876

Your Name			
Your Address			
Your Email			
Your Phone number			
Your Current age			
Your Ideal retirement age			
What is your investment experience?			
What is your time horizon?			
How liquid must your investment be?			
What kind of risk are you comfortable taking?			
What is your net worth, including home ownership, securities, assets, and liabilities?			
Are You:	Employed <input type="checkbox"/>	Unemployed <input type="checkbox"/>	Self-Employed <input type="checkbox"/>
			Business Owner <input type="checkbox"/>
Is your income stable?			Yes <input type="checkbox"/> No <input type="checkbox"/>
Are you suffering from financial losses because of recent economic downturn?			Yes <input type="checkbox"/> No <input type="checkbox"/>
Are you concerned about too many bills or Debts?			Yes <input type="checkbox"/> No <input type="checkbox"/>
Are you concerned about lack of savings or investment for retirement?			Yes <input type="checkbox"/> No <input type="checkbox"/>
Are you concerned about children' college cost?			yes <input type="checkbox"/> No <input type="checkbox"/>
Are you concerned about not having proper protection in the event of disability, long term illness, or death?			Yes <input type="checkbox"/> No <input type="checkbox"/>
Are you married?			Yes <input type="checkbox"/> No <input type="checkbox"/>
Do you support children, aging parents, or other dependents?			Yes <input type="checkbox"/> No <input type="checkbox"/>
Are concern about the future of your job or career?			Yes <input type="checkbox"/> No <input type="checkbox"/>
Do you feel that financial concepts that involves investment, insurance, debt, inflation, and tax is confusing?			Yes <input type="checkbox"/> No <input type="checkbox"/>
Do you want to learn more about how money works?			Yes <input type="checkbox"/> No <input type="checkbox"/>
Do you want to learn more about wealth Management?			Yes <input type="checkbox"/> No <input type="checkbox"/>
Do you want to build a stronger financial foundation?			Yes <input type="checkbox"/> No <input type="checkbox"/>
Do you need help reaching your financial goal?			Yes <input type="checkbox"/> No <input type="checkbox"/>
Are you interested in making money on a part-time basis			Yes <input type="checkbox"/> No <input type="checkbox"/>
Do you want to explore a new business opportunity?			Yes <input type="checkbox"/> No <input type="checkbox"/>
Do you have employee stock options?			Yes <input type="checkbox"/> No <input type="checkbox"/>
What plans do you have the money you save or invest?		Beter return <input type="checkbox"/>	Better Safety <input type="checkbox"/>