



Name *

Email *

Phone

Zip code

Quick Questions and Answers

I. What investing activities are you currently doing?

- I'm a day-trader.
- I'm a stock-picker.
- I'm a passive investor.
- I have no strategy

2. How would you describe your Investing style?

- Conservative investor
- Moderate investor
- Moderate plus investor
- Aggressive investor

3. What's your retirement timeline?

- I'm already retired
- 1-2 years before retirement
- Retiring In the next 3-5 years or more

4. What do you currently invest in? (Check all that apply)*

- Stocks, bonds, mutual funds
- IRA, Roth IRA, 401(K)
- Real Estate
- Annuities
- Precious Metals
- Other

5. Do you prefer:

- Golfing
- Boating
- Camping
- Traveling

6. How much money do you currently have saved for your retirement?*

Under \$100,000

100k - 200k

200,000k+

7. Where do you want to be in the next 3-5 years?
