



©

Email filled questionnaire to info@andaluciafinanciam.com

(For company use only) Client Code _____

Client Name _____

Risk Tolerance Questionnaire



I. Personal Information

Name: _____

Age: _____

Sex: Male Female

Marital Status: Married Single

Number of dependents: _____

Ages of dependents: _____ - _____ - _____ - _____ - _____ - _____

Email: _____

Nationality: _____

Country of Residence: _____

City of Residence: _____

Contact phone: _____

Best time to contact

9 AM to 1 PM 1 PM to 5 PM 5 PM to 9 PM

Remarks:



II. Net Worth Information

A. Assets: Including Cash, Bank Balances, Cars, Houses, Offices, Shares, etc...

<u>Asset</u>	<u>Current Value (approximate)</u>	<u>Remaining Installments</u>	<u>Remarks</u>

B. Liabilities: Debts other than asset installments, including credit card debts and debts to individuals and/or institutions:

<u>Debtor</u>	<u>Value</u>	<u>Remarks</u>



III. Lifestyle Information

A. Income Information

Income Sources: Job Private Business Rental

Others (Specify): _____

Average Income: _____ L.E. Monthly Yearly

B. Expenses Information:

Average monthly expenses (excluding installments)

Regular: _____ L.E.

Summer: _____ L.E.

Seasonal: _____ L.E. (Season)*: _____

Installments explanation:

<u>Asset</u>	<u>Periodicity*</u>	<u>Installment in L.E.</u>	<u>Ends on (Date)</u>	<u>Remarks</u>
General Remarks:				

* Periodicity: M for Monthly, Q for Quarterly, S for Semi-Annually, Y for Yearly, If other specify

* Please specify season such as Ramadan or Haj Season or other

