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4. Investment needs (explain briefly):

4.1 Tax benefits _____

4.2 Spendable income, loan reduction or increased value _____

4.3 Short-term investment goals (less than 5 years) _____

4.4 Long-term investment goals (five or more years) _____

5. Investor's advisors:

5.1 Accountant _____
5.2 Insurance broker _____
5.3 Banker _____
5.4 Attorney _____
5.5 Stockbroker _____
5.6 Real estate broker _____

6. Educational background:

6.1 Degrees and majors _____

6.2 Real estate or law courses studied _____

7. Investor's special interests (hobbies, clubs, etc.):

8. Personality traits:

8.1 Positive and decisive? Yes No
8.2 Negative and evasive? Yes No
8.3 Passive and compliant? Yes No

9. Relationship with broker:

9.1 Brief description of previous relationships (business, social, civic) with investor: _____

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