

Free Portfolio Review

If you would like to have a free personalized Portfolio Review that is based upon your goals, objectives, and level of risk, please complete the following questionnaire and mail it to:

JPJ Investments
3201 Dee Street
Shreveport, LA 71104

This is the minimum information we must have for your first appointment. If you would like to review our Privacy Policy, please [click here](#).

You may direct the questionnaire to a specific JPJ associate, or you may let us pick one for you. You may review the qualifications of our representatives at our Web site, JPJInvestments.com.

Send this to:

- Joe Psalmonds, CFP
 Beth Psalmonds, CLU

- Carl B. Charing
 Let JPJ choose my Representative

Your Name _____ *Spouse's Name* _____
Date of Birth _____ *Date of Birth* _____
Business Phone _____ *Business Phone* _____
E-mail _____ *E-mail* _____

Street Address _____

City _____

State

- AL AR CA CO FL
 GA IL LA MD MS
 NC NM OK PA TX
 VA WA

Zip Code _____

Home Phone _____

Tell us how and when we should contact you.

Please call me at my Business phone Home phone

What time of day is best for you? Daytime Afternoons

Mornings Evenings

Please answer the following questions concerning your GOALS and CONCERNS.

(All information is strictly CONFIDENTIAL and is essential for a complete PROFILE REVIEW.)

Who is dependent on you for their financial support? What are their ages? _____

What do you consider to be your most important financial goal? _____

What is your greatest financial fear? _____

Do you have a will? Yes No

Date of Will _____

When investing money, rank the following concerns in order of importance from highest (1) to lowest (5). Use each number only once:

Safety	Income	Liquidity	Growth	Taxes
_____	_____	_____	_____	_____

How much risk would you accept for the chance of a better return on your money?

<input type="checkbox"/> Low (4 - 6%)	<input type="checkbox"/> High (10 - 12%)
<input type="checkbox"/> Moderate (7 - 9%)	<input type="checkbox"/> Aggressive (13- 15%)

Do you feel you should make more return on your money?

<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> It's about right
------------------------------	-----------------------------	---

What is your tax rate?

<input type="checkbox"/> 15%	<input type="checkbox"/> 31%	<input type="checkbox"/> 36%
<input type="checkbox"/> 28%	<input type="checkbox"/> 33 %	<input type="checkbox"/> 39.6%

If you are not sure about your tax rate, what is your annual income? \$ _____

Do you feel that you pay too much income tax? Yes No It's about right

How much of your income is Social Security? \$ _____

How much of your income is interest? \$ _____

How much of your income is salary or pension? \$ _____

Please describe the type of investments you have, i.e., C.D.'s Bonds, Stocks, Mutual Funds, Etc? _____

Your answers to the following questions will be used to generate a computer assisted asset allocation model that may be an appropriate method to help you achieve your stated goals, taking into account your investment horizon and tolerance for risk.

Your investment objective summarizes the primary purpose of your account. It serves to define how assets should be managed. While asking yourself "What do I want most to accomplish?", select the objective that best fits the purpose of your account.

- Preserve asset value
- Generate high current income
- Achieve asset growth with moderate current income
- Achieve strong asset growth with nominal income
- Achieve maximum capital appreciation

Please indicate your response to the following statement: "I am comfortable with investments that may go down in value from time to time, if they offer the potential for higher returns."

- Strongly disagree
- Disagree
- Somewhat agree
- Agree
- Strongly agree

Age is a very important determinant of portfolio selection. Please indicate your age group

- 35 or under
- 36 - 45
- 46 - 55
- 56 - 6465 or over

Your investment time horizon is an important variable to consider when constructing your account. How long will it be before you begin making withdrawals?

- 0 - 1 year
- 1 - 2 years
- 2 - 4 years
- 4 - 6 years
- More than 6 years

Once you begin taking withdrawals from your portfolio, how long will the money in the account have to last before it is depleted?

- Lump sum
- Less than 1 year
- 1 - 5 years
- 6 - 10 years
- 11 or more years

An assessment of your income requirements is essential in determining the appropriate asset allocation structure for your account. Please choose the option that best approximates the amount of CURRENT income your portfolio needs to generate annually.

_____ %

Example: You need \$50,000 per year, total income. You receive \$15,000 in Social Security and \$15,000 from a company retirement plan. Therefore, you need \$20,000 additional income and you have a \$200,000 portfolio, so you need 10%.

How long could you cover monthly living expenses with cash and investments you currently have on hand?

- 1 month or less
- 1 - 3 months
- 3 - 6 months
- 6 - 12 months
- 12 months or more

What is your outlook for your future income from sources other than investments over the next ten years (pay raises, cost of living increases, etc.)?

- It will greatly decrease
- It will decrease, but not by much
- It will stay the same
- It will increase, but not by much
- It will greatly increase

There is an old saying in financial planning that "The average American will spend more time planning their next vacation than they will planning their financial future". CONGRATULATIONS! You've taken the first step towards financial independence. Thank you for visiting our Web site and for filling out this important questionnaire. We will be in touch with you within five business days from our receipt to set a convenient time when we can discuss your review.