

Who referred you? _____

What did they say about us or our firm? _____

Have you ever worked with an advisor in the financial industry before? (Circle One) Yes No

If yes, what did you not like about that advisor? _____

What is your average rate of return expectation? (Circle One) 5%-6% 7%-8% 9%-10% 11%-12%

How would you summarize your current risk level? (Circle One) 1 being "no risk" and 10 being "high risk".

1 2 3 4 5 6 7 8 9 10

How would you best describe your reaction to a decline in your account value, assuming a diversified portfolio of stocks and bonds. (Circle one letter)

- A) Actually, I/we do not want any risk and do not want to experience any decline in values.
- B) I/We feel that a financial advisor should see that our account always goes up and that if my/our account(s) declined in any given year, we would probably move our account(s) to another advisor.
- C) I/We understand that it is normal and customary for negative returns to occur from time to time. I/We would likely stay the course.
- D) I/We understand that it is normal and customary for negative returns to occur from time to time. I/We would consider taking advantage of a potentially undervalued market and increase our risk.
- E) I/We don't really have any idea what you are asking.

Assuming you can tolerate variable returns, what is the approximate maximum decline you would be willing to accept in any given year? (Circle One)

N/A (I /we don't want any declines.) 1% 2% 3% 4% 5% 6% 7% 8% 9% 10% 12% 14% 16% 18% 20%

What percentage of your total investments are you considering having Emerald Coast Financial Team manage? (Circle One: Include employer retirement plan values in total investments.)

I have no current investments. 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

What is the approximate value of this percentage? _____

What is your current monthly income need to "pay the bills?" _____
(Including All Taxes)

What additional monthly income do you desire? _____

Total Monthly Income Need _____

Do you currently receive any wages? If yes, how much monthly? _____ (Gross)

Do you currently receive pension income? If yes, how much monthly? _____ (Gross)

Do you currently receive Social Security? If yes, how much monthly? _____ (Gross)

Do you have any children? (Circle One) Yes No

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