

## Newton Wealth Management Questionnaire

Full Name

Email Address

Age

Marital Status

Amount of Money Currently Invested in the Markets  
(IRA, 401k, Trust, Joint)

What is your investment Time Horizon?

Any Current Education Funding Responsibilities?    Yes        No

I would like to retire in the next:

Do you have Life Insurance?    Yes        No

Your Legacy Goals:

- Leaving funds to children/grandchildren
- Spending all funds before death
- Retiring with enough money to travel the world
- Does not matter how much money is left

Other Financial Goals:

- Lower Debt
- Pay off home
- Pay off student loans
- Retire Early

How are you currently invested?

401(k) Plan

IRA's

Individual/Joint

Trust

Other

Imagine that six months after making an investment the financial markets start to perform badly. In line with this, your own investment goes down by a significant amount. What would your reaction be?

Transfer your money to a more secure investment product to reduce the risk of further losses.

Monitor the investment and wait to see if it improves.

Invest more funds to take advantage of the lower price, expecting future growth.

What amount of risk do you feel you have taken with your past financial decisions?

Small

Medium

Large

I would describe my knowledge of investments as:

None

Limited

Good

Extensive