Red Hawk Prosperity Partners
IAA, Attachment B - Client Profile

RHPP Account Custodian: ______________________

Account #: ______________________

Personal Information

	Client #1	Client #2
Name(s):		
Address:		
E-mail:		
Phone:		
Social Security #		
Client Age(s):		
Desired Retirement Age(s):		
Current Annual Income(s):	$	$
Net Worth: (Including Residence)	$	$
Mortgage Balance:	$	$
Liquid Net Worth	$	$

Current Investments

Where Held	Type	Value
		$
		$
		$

Risk Assessment

Client risk assessment is a regulatory requirement for investment advisors, and the following is only intended as a tool to help determine your risk tolerance. The numbers do not represent actual projections of possible gains or losses in your account.

Check One	"I think I am a"	Gain Potential Next 12 Months	Loss Potential Next 12 Months
	Conservative Risk Investor	Gain of + 8%	Loss of - 4%
	Moderate Risk Investor	Gain of + 10%	Loss of - 8%
	Somewhat Aggressive Risk Investor	Gain of + 15%	Loss of - 12%
	Aggressive Risk Investor	Gain of + 20%	Loss of - 20%

Investment Time Horizon

Money is Needed	Retirement	College Savings	Other Goals
0-3 years	☐	☐	☐
3-7 years	☐	☐	☐
7-10 years	☐	☐	☐
Over 10 years	☐	☐	☐