



Portfolio Analysis Request

Date:

Name:

Email:

Phone:

Please Allow 5 Business Days for Reports to Prepared

Once we receive a copy of your statements, we will automatically create for you a Morningstar Report, a Portfolio Pilot report and a Mutual Funds Stress Test (if applicable). In order to provide a thorough analysis, please complete a RiskTolerance Questionnaire and attached to this form.

With respect to your current portfolio:

- What are your concerns?
- What are your goal for these assets?
- Do your need income from these assets? If So, how much?
- Do they want to keep any of your holdings? If so, which ones and why?
- What is the estimated amount of assets being considered for a managed portfolio?
- Do you have personal investing preferences or opinions?
- Additional comments:
