

Investment Position Statement

1. Investor Information

2. Statement Purpose

3. Investment Objectives

- Growth / Capital Appreciation:

- Income:

- Preservation of Capital:

- Other Objectives:

4. Risk Tolerance

5. Investment Time Horizon

6. Liquidity Requirements

7. Asset Allocation

Asset Class	Target Allocation (%)
Equities	
Fixed Income	
Cash & Equivalents	

Alternative Investments

Other

8. Investment Constraints

- Legal & Regulatory:

- Tax Considerations:

- Unique Circumstances:

9. Monitoring & Review Process

10. Signatures

Investor:

Date:

Advisor:

Date:
