

# Investment Position Statement

## 1. Investor Information

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## 2. Statement Purpose

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## 3. Investment Objectives

- Growth / Capital Appreciation:

- Income:

- Preservation of Capital:

- Other Objectives:

## 4. Risk Tolerance

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## 5. Investment Time Horizon

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## 6. Liquidity Requirements

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## 7. Asset Allocation

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

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Alternative Investments

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Other

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## 8. Investment Constraints

- Legal & Regulatory:

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- Tax Considerations:

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- Unique Circumstances:

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## 9. Monitoring & Review Process

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## 10. Signatures

Investor:

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Date:

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Advisor:

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Date:

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