





**Financial and Investment Information**

Note: Completing this section is not obligatory

**Risk Profile**

Select one:

- Primary
- Conservative
- Moderate
- 

**Return Objective**

Select one:

- accounts
- Current Income
- Growth
- 

**Investment Experience**

Please enter the number of years

experience investing with:

- Equities \_\_\_\_\_
- Futures: \_\_\_\_\_
- Options: \_\_\_\_\_
- Other: \_\_\_\_\_

**Other brokerage**

firm where

are held:

**Net Worth**

- Euro 100'000 to 500'000
- Euro 500'000 to 1'000'000
- Euro 1'000'000 to meglio

**Liquid Assets**

- Euro 100'000 or meno
- Euro 100'000 to 500'000
- Euro 500'000 or greater

**Annual Income**

- Euro 100'000 or meno
- Euro 100'000 to 500'000
- Euro 500'000 or greater

Is the client a Trustee, Principal or Control person of any publicly traded Corporation (Control person is an Officer, Director or 10% Shareholder)?

- YES
  - NO
- If yes, specify the corporation:

Does the client have other accounts / facilities with SM?

- YES
  - NO
- If yes, specify the account number(s):

**Agreement**

BY SIGNING BELOW, I ACKNOWLEDGE AND AGREE: I have supplied all of the information requested in this form and I declare it as true and accurate and further agree to notify Swiss Management SA in writing of any changes including those in my financial situation or investment objectives.

Date: \_\_\_\_\_ Name and Surname: \_\_\_\_\_ Authorized Signature: \_\_\_\_\_

please return duly signed to Swiss Management SA by e-mail or by post

Mail: [info@swiss-managers.com](mailto:info@swiss-managers.com)

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or

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