

300 NORTH EXECUTIVE DRIVE, SUITE 125 BROOKFIELD, WI 53005 www.realwealthadvisors.com

| INVESTMENT KNOWLEDGE | | | | | | | |
|--------------------------------|---|---------|---------------------|---------|-----------|--------------------|-----------|
| Primary | : | None | Limited | Good | Excellent | Decline | to Answer |
| Spouse | : | None | Limited | Good | Excellent | Decline | to Answer |
| YEARS OF INVESTMENT EXPERIENCE | | | | | | | |
| | | < 5 Yrs | Primary 5-10 Yrs | 10+ Yrs | ; < 5 Yrs | Spouse 5-10 Yrs | 10+ Yrs |
| Mutual Funds | : | < 5 H3 | 3-10 113 | 101 113 | V 3 113 | 3-10 113 | 101 113 |
| Stocks | : | | | | | | |
| Bonds | : | | | | | | |
| Annuities | : | | | | | | |
| Options | : | | | | | | |
| Alternative Invest. | : | | | | | | |
| Employer Plans | : | | | | | | |
| Managed Accounts | : | | | | | | |
| Other | : | | | | | | |

ADDITIONAL NOTES

