 Calgary ShareClub

New Member Survey

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Contact Phone: (XXX) XXX-XXXX

Note: Clicking with a mouse on the boxes below will insert an X

1. How long have you been investing?

Less than 5 years

5-10 years

10-20 years

20 years +

1. Are you a self directed investor?

Yes

No

1. What type of investor are you?

Invest for Dividend Yield

Total Return (capital gains plus dividend yield)

Options Trader

1. What is your investor risk profile?

Very Conservative

Conservative

Balance

Growth

Aggressive Growth

1. What is your investement time horizon?

Less than 2 years

3-5 years

5-10 years

10-20 years

20 years +

1. What phase of your investment life are you?

Accumulation phase

Withdrawal phase

By returning this form you agree to abide by the Calgary Shareclub Members Statement of Privacy and Confidentiality sent to you with this Calgary Shareclub New Member Survey.