 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.