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CONFIDENTIAL FINANCIAL PROFILE

Date _____

A. PERSONAL INFORMATION

Name _____ Birth date _____

Name of Spouse _____ Birth date _____

Birth dates of dependents _____

B. FINANCIAL DATA

Annual household income and sources _____

Foreseeable changes in employment, income and when likely _____

Total value of investments in stocks, mutual funds, bonds, etc., including retirement accounts:

C. PURPOSE OF INVESTMENT IN MDP MANAGED ACCOUNTS PROGRAM(S)

Anticipated use of investment _____

When or how long until these funds will be needed _____

D. RISK TOLERANCE

Amount of investment knowledge (1=none to 5=extensive) _____

Amount of investment experience (1=none to 5=extensive) _____

I am comfortable with investments that may lose money from time to time if they offer the potential for higher returns (1=strongly disagree to 5=strongly agree) _____

I will still keep an investment even if it loses the following percentages over the course of a year (1=strongly disagree to 5=strongly agree): 10% _____; 15% _____; 20% _____

Overall, my personal financial situation (that is, my job outlook and my ability to pay my bills) is secure (1=strongly disagree to 5=strongly agree) _____