



Antone Capital Management, Inc.

Please find below our initial confidential questionnaire.

The purpose of the questionnaire is to better understand your situation and goals, to better provide you with the most appropriate investment advice. We recommend that you complete this prior to the initial consultation.

We understand that it may not be easy for individuals to disclose their intimate financial information to advisors they have not yet met. Therefore, feel free to answer only those items you are comfortable disclosing at this time.

This questionnaire can be emailed to us, or if you prefer, you can print it out and fax it or mail it to us.

Name: _____

Email: _____

Mailing Address: _____

City: _____ State: _____ Zip: _____

Preferred Phone Number: _____

Secondary Phone Number: _____

Please provide a range for your current annual income: _____

Age: _____

If you are married and you and your spouse contribute together to the living expenses, please provide an estimate for the current combined annual income:

If you expect your income to significantly change in the next five years, please explain:

Please provide an estimate for the total liquid assets you intend to invest with us:

Please provide an idea, if possible, of your total amount of liquid assets:

Please provide an idea of your total equity, which includes all of your assets and the equity in your home, and any other investments you may have:

Please provide, in your own words, how you describe yourself and your goals as far as risk tolerance, the expected length of your investments, your expectations, and anything else you deem important:
