

## CLIENT PROFILE

To help us meet your investment objectives, please complete this questionnaire as fully as possible. Thank you.

**Account Title** : \_\_\_\_\_

**Telephone #** : \_\_\_\_\_

### Occupation

Accountant	<input type="checkbox"/>	Businessman	<input type="checkbox"/>
Doctor	<input type="checkbox"/>	Management	<input type="checkbox"/>
Engineer	<input type="checkbox"/>	Technical	<input type="checkbox"/>
Lawyer	<input type="checkbox"/>	Clerical	<input type="checkbox"/>
Other Professional	<input type="checkbox"/>	Retired	<input type="checkbox"/>
Others (please specify): _____			

### Years of Experience in Trading Shares

None	<input type="checkbox"/>	Less than 2 years	<input type="checkbox"/>
2 to 5 years	<input type="checkbox"/>	Above 5 years	<input type="checkbox"/>

### Type of Investor/Investor Objectives

Capital Preservation	<input type="checkbox"/>	Income	<input type="checkbox"/>
Growth	<input type="checkbox"/>	Speculation	<input type="checkbox"/>

### Annual Income

Less than Rs.300,000	<input type="checkbox"/>	Rs.300,000 to Rs.500,000	<input type="checkbox"/>
Rs.500,000 to Rs.1,000,000	<input type="checkbox"/>	Above Rs.1,000,000	<input type="checkbox"/>

### Investible Amount / Portfolio Size

Less than Rs.200,000	<input type="checkbox"/>	Rs.200,000 to Rs.500,000	<input type="checkbox"/>
Rs.500,000 to Rs.1,000,000	<input type="checkbox"/>	Above Rs.1,000,000	<input type="checkbox"/>

### Introduction (Source of Account Opening)

Mailing from TSL	<input type="checkbox"/>	Seminar/Conference	<input type="checkbox"/>
Advertisement	<input type="checkbox"/>	Walk/Phone in	<input type="checkbox"/>
TSL Web Site	<input type="checkbox"/>	Referral	<input type="checkbox"/>
Other Web Site	<input type="checkbox"/>		

**How often would you like to be called for a market update?**

Morning pre-market  Afternoon   
 After market  Other (specify)

**Which of the following research reports would you like to receive from Taurus?**

Daily Morning Briefing  Technical Outlook Daily   
 Monthly Value Call  Weekly   
 Sector / Company reports  Quarterly   
 Badla Report Daily   
 Weekly

**How would you like to receive the daily / weekly research reports?**

E-mail  Fax   
 Address: \_\_\_\_\_ No.: \_\_\_\_\_

**How would you like to receive your account statement?**

E-mail  Fax  Courier   
 Address: \_\_\_\_\_ No.: \_\_\_\_\_ Address: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**How frequently would you like to receive your account statement?**

Monthly  Quarterly  Six Monthly

*For office use only*

Acknowledgement by	C&S	Equity Sales	Research
Received by			
Date			