

投資者問卷 Investor Questionnaire


客戶號碼 Client Account No.: _____

客戶姓名 Client(s) Name: _____

1. 您現時的年紀？ What is your current age ? 18-30 31-40 41-50 51-60 60 以上 Above
2. 您的應急資金可以應付多少個月的日常開支？
How many months of expenses can your emergency funds cover? 九個月以上 >9mths 七至九個月 7 to 9 mths
 四至六個月 4 to 6mths 少於三個月 <3mths
 沒有應急資金 no emergency funds
3. 您可以用作投資的款項佔您收入百分比為？
What percentage of monthly income can be invested? >30% 21-30% 11-20% 0-10%
4. 您的投資期限是多久？
When do you expect to liquidate your investment? >7 年 yrs 6-7 年 yrs 3-5 年 yrs 0-2 年 yrs
5. 有多少人在財務上依賴您以維持日常生活？
How many people depend on you financially? 0 1 2-3 >3
6. 我願意承擔高度投資風險以實現高投資報酬。
In order to achieve high returns I am willing to choose high risk investments. 1 2 3 4 5
非常同意 Strongly Agree 非常不同意 Strongly Disagree
7. 相對於獲取高投資回報，我更傾向於維持資金安全。
I prefer to keep capital safe rather than have high returns. 1 2 3 4 5
非常同意 Strongly Agree 非常不同意 Strongly Disagree
8. 您的預期年度投資潛在回報率是多少？
What is your expected rate of return per annum from your investments? >15% 15% 12% 10% <10%
9. 當您的整體投資資產每年下跌多少百分比，您會開始感到不安？
I would start to worry about my investments if my portfolio value falls per annum? >30% 20-30% 10-20% 5-10% <5%
10. 您整體投資資產內的最大資金盈餘會擺放於
The maximum surplus in your current portfolio is parked into 房地產 Real Estate 互惠基金 Mutual Funds
 股票及衍生產品 Equities and Derivatives
 債券 Bonds 儲蓄及定期存款 Savings and fixed deposits
11. 您的主要投資目標是什麼？
What is your primary investment objective? 提升未來生活水平 Future Lifestyle Improvement
 資本增值 Capital Appreciation 保本 Capital Preservation
 孩子的教育 Children Education 退休計劃 Retirement Planning
12. 您每年實得收入(扣除所有稅項後)有多少港幣？
What is your annual take home income in HKD? >2 百萬 mils 1-2 百萬 mils
 0.5-1 百萬 200,000-500,000
 <200,000
13. 您用於償還債務的款項佔您實得收入百分比為？
What percentage of your take home income goes into repaying your liabilities? 0-10% 10-20% 21-30% 31-50% >50%

聲明與簽署 Declaration and Signature(s)

- 本人確認所提供的問卷資料在提供當時均屬真確。I hereby affirm that the information provided in this questionnaire is accurate as of the moment of provision.
- 本人已明白倘若問卷內容不實，泰嘉將不能夠評估所要求服務對本人的適合性。I understood that TSAM will be unable to assess the suitability of the requested service to my interest if I fill in the questionnaire incorrectly.
- 本人確認已收受《風險披露聲明》，並進一步確認了解當中內容。I hereby acknowledge my/our receipt of the "Risks Disclosures Statement". I further confirm that I/we understand the content of which.

Client Signature(s) 客戶簽署 

日期 Date: