

Trident Wealth Management, LLC

Confidential Client Questionnaire Preface

1. What about your current situation is motivating you to seek investment counsel at this time?

2. What are your primary financial goals and objectives?

3. What would you expect your investments to look like five years from now?

4. What areas of your investments would you most like to improve upon?

5. What additional concerns or comments do you have about your investments?
