



**INVESTMENT  
ACADEMY**

"Wataalamu" in Forex, Stock Market & Conference Training

Company Reg No. 2013/210552/07 | Vat No. 4610268700

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OFFICE/FRANCHISEE
(Hereinafter called "The Franchisee")

## ASSESSMENT FORM

Date		Telemarketer	
Name			
ID Number			
Tel	(c)	(w)	(h)
Address			
Email			
Company	Occupation		<input type="checkbox"/> Years
Gross Salary	R.....	Net Salary	R.....

### MARITAL STATUS

- Single       Divorced  
 Married       Widowed  
 Other

### INVESTMENT PROFILE:

- Life Policies       Current Acc  
 Retirement Ann       Shares  
 Unit Trusts       Property  
 Fixed Deposits       Credit Card

Where did you hear about the Forex & Stock market? .....

Comments: \_\_\_\_\_