Portfolio Analysis Review (PAR) Request Form

Please complete the Color of Money Risk Analysis electronically, then upload this form along with investment statements to Case Central. Please allow 3 full business days for completion.

Advisor: Benny Hevia

Client: ___________________________________

With respect to the client's current portfolio:

- What are their Concerns? ___________________________________
- What is their goal for these assets? ___________________________________
- Do they need income from these assets? If so, how much? ___________________________________
- When do they need income from these assets? ___________________________________
- Do they want to keep any of their accounts/holdings? If so, which ones and why? ___________________________________
- What is the estimated amount of assets being considered for transition/transfer? ___________________________________
- Are they interested in any particular investment vehicle? ___________________________________
- Do they have any personal investing preferences or opinions? ___________________________________
- Additional Comments: ___________________________________

A PAR consists of the following 5 reports:

- Commentary
- Account Summary
- Morningstar
- Portfolio Pilot (Risk/Reward)
- Stock Intersection