

G.L.A INVE$T RE$EARCH

Client Intake Form

Independent Research. Informed Decisions.
With Coach Kyle | 25-year Wall Street veteran and former broker

Welcome, and thank you for choosing G.L.A INVE$T RE$EARCH. This form helps us build a customized research product and service around you, so you can make informed decisions and stay in the know across all of your investments.

Our service gives you independent, experienced insight and perspective you can use to make actionable decisions. One-on-one coaching calls, monthly customized newsletters, and on-demand Deep Dive reports are something no other newsletter offers. We are your very own research consultant, available to premium subscribers 24/7/365 with Coach Kyle.

> **Why accuracy matters:** Please fill this out as accurately and completely as you can. Everything we build for you (your newsletter, your Deep Dives, and your coaching calls) starts with what you share here. Approximate numbers are perfectly fine.
>
> *We will never ask for your Social Security number, account numbers, or passwords. Please do not include them.*

1 Personal Information

FULL NAME

DATE OF BIRTH (MM/DD/YYYY)

STREET ADDRESS

CITY

STATE

ZIP CODE

EMAIL

PHONE

2 Investments Overview

About how much do you have invested in the market in total, across all accounts? Check one.

- ☐ Under $25K
- ☐ $25K - $100K
- ☐ $100K - $250K
- ☐ $250K - $500K
- ☐ $500K - $1M
- ☐ $1M - $5M
- ☐ $5M+

3 Your Accounts

List each investment account and who manages it. Account type examples: IRA, Roth IRA, 401(k), Brokerage / Individual, Joint, Trust, HSA, 529, Other. No account numbers, please.

#	ACCOUNT TYPE	FIRM MANAGING IT (E.G. FIDELITY, SCHWAB)	APPROX. VALUE	WHO MANAGES IT?	
1				☐ Self-directed	☐ Advisor
2				☐ Self-directed	☐ Advisor
3				☐ Self-directed	☐ Advisor
4				☐ Self-directed	☐ Advisor
5				☐ Self-directed	☐ Advisor
6				☐ Self-directed	☐ Advisor
7				☐ Self-directed	☐ Advisor
8				☐ Self-directed	☐ Advisor

4 Public Market Holdings

The stocks and ETFs you own. Your largest positions first is perfect. Approximate % or dollar value is fine.

#	COMPANY / ETF	TICKER	APPROX. % OR VALUE	WHICH ACCOUNT
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				

5 Private Market Investments

Pre-IPO shares, private funds, SPVs, or other private deals.

#	COMPANY OR FUND	BOUGHT THROUGH (EQUITYZEN, FORGE, DESTINY, SPV...)	APPROX. AMOUNT	YEAR
1				
2				
3				
4				
5				
6				
7				
8				

6 Your Goals

Check all that apply.

- ☐ Retirement
- ☐ Generational wealth
- ☐ Income
- ☐ Growth
- ☐ Kids' / grandkids' education
- ☐ Buying a home
- ☐ Other

IF OTHER, PLEASE DESCRIBE

TIME HORIZON FOR YOUR MAIN GOAL (CHECK ONE)

- ☐ Under 3 years
- ☐ 3 - 5 years
- ☐ 5 - 10 years
- ☐ 10 - 20 years
- ☐ 20+ years

IN YOUR OWN WORDS: WHAT DOES SUCCESS LOOK LIKE FOR YOU?

7 Your Interests in the Market

Which areas would you like us to cover for you? Check all that apply.

- ☐ AI
- ☐ Robotics
- ☐ Gold & silver
- ☐ Real estate
- ☐ Tesla / Elon companies
- ☐ Energy storage
- ☐ Options
- ☐ Mag 7
- ☐ SpaceX
- ☐ Crypto / Bitcoin
- ☐ Pre-IPO / private markets
- ☐ Other

IF OTHER, PLEASE DESCRIBE

COMFORT WITH VOLATILITY: MARKET UPS AND DOWNS (CHECK ONE, 1 = LOW, 5 = HIGH)

☐ 1 - Cautious ☐ 2 ☐ 3 - Balanced ☐ 4 ☐ 5 - Comfortable

8 Family

Helps us tailor ideas for education, gifting, and generational planning.

NUMBER OF CHILDREN

NUMBER OF GRANDCHILDREN

Accounts for children / grandchildren. Account type examples: custodial (UTMA/UGMA), 529, Roth IRA, Trump Account, brokerage.

#	FIRST NAME	CHILD OR GRANDCHILD	AGE	ACCOUNT SET UP?		ACCOUNT TYPE
1				☐ Yes	☐ No	
2				☐ Yes	☐ No	
3				☐ Yes	☐ No	
4				☐ Yes	☐ No	
5				☐ Yes	☐ No	
6				☐ Yes	☐ No	

9 Anything Else + Coaching Calls

ANYTHING ELSE WE SHOULD KNOW? (QUESTIONS, CONCERNS, UPCOMING LIFE EVENTS)

PREFERRED CONTACT METHOD

☐ Phone call ☐ Video call ☐ Text ☐ Email

BEST DAYS / TIMES FOR COACHING CALLS

☐ Weekdays ☐ Weekends ☐ Mornings ☐ Afternoons ☐ Evenings

SPECIFIC DAYS / TIMES THAT WORK BEST

TIME ZONE

10 Acknowledgment & Signature

By signing below, I confirm that the information I provided is accurate and complete to the best of my knowledge. I understand that G.L.A INVE$T RE$EARCH provides independent research and education only, is not a registered investment adviser or broker-dealer, and does not manage my money or make trades for me. All investment decisions are my own.

☐ I confirm the above and that I have not included any SSN, account numbers, or passwords.

SIGNATURE (TYPE YOUR FULL NAME)

DATE

Thank you! Please return your completed form to Coach Kyle. We will review it and reach out to schedule your first coaching call.