



Trusskey Investment Advisors

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INVESTOR PROFILE QUESTIONNAIRE

Dated 03-15-08

Please give us some background information regarding yourself and the money you want professionally managed. This questionnaire is a guideline to assist you in determining your investment profile. The questionnaire will help define important factors such as your investment objectives, time horizon and your attitude towards investing. The completed questionnaire will then serve as the basis for determining your suitability for our investment programs.

Account Registration: _____
(Name(s) on Account) (Please note that only one form needed per family)

Address: _____

City, State and Zip Code: _____

Tax Status: _____ % Occupation: _____ Employer: _____

Employer Address: _____

TIA Managed Portfolio Description

Portfolio Description:

Many investors look forward to or are enjoying a more active, but secure retirement. Their idea of a perfect day is playing golf or walking on manicured paths, meeting friends for dinner at fine restaurants, spoiling grand children or relaxing at a well-appointed health club and spa. In the investment world, this investor would be comfortable with the TIA Portfolio, which offers a conservative, comfortable, "no worries" approach to investing. You enjoy your life and we will manage and grow your assets. It is that simple! With extremely low management fees combined with one of the best risk adjusted performance portfolios in the business, an investor would be hard pressed not to put a significant portion of their assets into the TIA Portfolio. The TIA Portfolio seeks to meet or exceed the performance of the Standard and Poors 500 Index with 25% to 50% less exposure and risk than the "buy and hold" market. This means that about 50% to 75% of the year, we are holding Money Market Funds.

Performance Objective:

Capital Growth with Capital Preservation by remaining in Money Market Funds in uncertain and volatile or hostile market conditions.

Risk Profile:

Conservative Growth and a one-year time horizon is recommended but not required.

Suitability Statement:

The constant monitoring of this portfolio and because the assets usually reside in money market funds, this portfolio is suitable for any equity investor.

Investment Questionnaire

“Circle” or “Check” all that apply:

Annual Income:

- Less than \$50,000
- \$50,000 - \$100,000
- \$100,000 - \$200,000
- \$200,000 - \$500,000
- \$500,000 - \$1,000,000
- \$1,000,000 or More

Net Worth:

- Less than \$50,000
- \$50,000 - \$100,000
- \$100,000 - \$200,000
- \$200,000 - \$500,000
- \$500,000 - \$1,000,000
- \$1,000,000 or More

- 1) Which of the following best describes your investment objectives?
 - a) Preserving capital
 - b) Generating current income
 - c) Generating income and growing my assets
 - d) Growing my assets substantially
- 2) What is your main source of income?
 - a) Retirement savings
 - b) Pension, social security & savings
 - c) Other investments
 - d) Earned income
- 3) What is your age?
 - a) Over 55
 - b) 45 to 55
 - c) 35 to 45
 - d) Under 35
- 4) What is your time frame for achieving your financial goals?
 - a) 0 to 5 years
 - b) 5 to 10 years
 - c) 10 to 15 years
 - d) 15 years or longer
- 5) What average annual returns are you seeking?
 - a) 5% to 8%
 - b) 8% to 12%
 - c) 12% to 15%
 - d) 15% or more
- 6) Will you require regular income from this investment?
 - a) Yes, I will make regular withdrawals.
 - b) No, I have other sources of income.
- 7) How would you feel about a 15% decline in your portfolio?
 - a) Very concerned, I cannot accept such fluctuations in my portfolio.
 - b) I invest for long-term growth but I would be concerned.
 - c) I invest for long-term growth and I can accept such fluctuations.
- 8) What do you expect your standard of living to be five years from now?
 - a) The same as it is now.
 - b) Moderately greater than it is today.
 - c) Substantially greater than it is today.
- 9) What % of your assets will this investment represent?
 - a) Less than 5%
 - b) 5% to 10%
 - c) 10% to 20%
 - d) 20% to 30%
 - e) 30% to 40%
 - f) 40% or more
- 10) When will you need access to this investment?
 - a) 1 to 3 years
 - b) 3 to 5 years
 - c) 5 to 10 years
 - d) Over 10 years
- 11) What type of investments have you made in the past? (Circle all that apply)
 - a) CD's and money markets only
 - b) Bonds and bond funds
 - c) Stock mutual funds
 - d) Individual stocks

Briefly state your investment objectives or any special concerns we should know about:

The client certifies that all the information contained in this questionnaire is accurate and true. The client will hold Truskey Investment Advisors harmless of any misinformation or omissions from this questionnaire. The client agrees to notify Truskey Investment Advisors in writing at any time when the client's financial conditions change.

CLIENT SIGNATURE:

DATE:

JOINT CLIENT SIGNATURE:
(If Applicable)

DATE:

ACCEPTED BY:

DATE:

MATTHEW M. TRUSSKEY, dba TRUSSKEY INVESTMENT ADVISORS

This completed document should be forwarded to:

**Truskey Investment Advisors
137 Lakeside Drive
Montgomery, TX 77356**