



INVESTING WITH
ClarityTM
INVESTMENT STRESS TESTTM

Presented to:

Presented by:

Date:

INVESTING WITH CLARITYTM



INVESTMENT STRESS TEST™

Name
Portfolio
Date

SUMMARY:

TOTAL # OF HOLDINGS	TOTAL # OF EQUITIES	TOTAL # OF BONDS	% OF PORTFOLIO IN THE TOP TEN STOCKS HELD

LARGEST HOLDING AND % OF PORTFOLIO	2ND LARGEST HOLDING AND % OF PORTFOLIO	3RD LARGEST HOLDING AND % OF PORTFOLIO

% OF PORTFOLIO IN US STOCKS	% OF PORTFOLIO IN NON-US STOCKS	% OF PORTFOLIO IN BONDS	% OF PORTFOLIO IN CASH	% OF PORTFOLIO IN OTHER ASSETS

% OF PORTFOLIO IN LARGE CAP	% OF PORTFOLIO IN MID CAP	% OF PORTFOLIO IN SMALL CAP

	VALUE	CORE	GROWTH
LARGE CAP			
MID CAP			
SMALL CAP			

NEPSIS CAPITAL MANAGEMENT

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www.nepsiscapital.com | Blog: www.InvestingWithClarity.com

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INVESTMENT STRESS TEST™

Name
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TOTAL # OF HOLDINGS	% OF PORTFOLIO IN THE TOP TEN

PORTFOLIO PROS:

PORTFOLIO CONS:

RECOMMENDATIONS: (Provided by Mark Pearson, President and Chief Investment Officer)

- Do you presently work with a wealth advisor or financial planner? YES NO
- Do you have a spouse or significant other that has their own investments? YES NO UNSURE
- Has your experience with your present investment professional been: GREAT GOOD POOR
- What do you hope to gain from taking the analysis? _____
- What is your age range? 18-26 26-35 36-45 46-55 56-65 66-75 76+
- Do you have an Investment Policy Statement in place? YES NO
- What is the Investment objective of your portfolio? _____

NEXT STEPS:

Please schedule a follow-up meeting to discuss the specifics of your portfolio and how to improve your investment approach. Your Nepsis Advisor will help to identify any information needed for the meeting.

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Research and analytical tools for this Portfolio Analysis are provided by Morningstar, Inc. which is solely responsible for the accuracy of its information. Morningstar, Inc. and Nepsis Capital Management, Inc. are unaffiliated.

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A large, light gray graphic consisting of several overlapping, curved bands that form a complex, geometric shape, possibly a stylized letter 'A' or a similar abstract design, positioned on the left side of the page.

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