GCINT (HK) Limited 金禧國際證券(香港)有限公司
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Account Name:______________________________ Account no.：____________________ AE Code: ______________

INVESTOR SUITABILITY ASSESSMENT FORM
《客戶投資風險評估表》

IMPORTANT NOTES BEFORE COMPLETING THIS FORM 填寫此評估表前的重要備註

This Investor Suitability Assessment Form ("Assessment Form") is designed to understand your/the client's financial situation, investment experience, investment objectives, risk appetite and risk tolerance level, etc. helping you/the client to identify whether an investment product would be suitable for you/the client. In case of joint account or corporate account where there are more than one investment decision maker, every account holder/ investment decision maker should be completing one separate Assessment Form.
此客戶投資風險評估表("評估表")旨在瞭解您/客戶的投資目標、風險偏好和風險承受能力水準，說明您/客戶確定適合您/客戶的投資選擇。如果是聯名帳戶或機構帳戶(包括公司帳戶)，投資決策者應填寫此評估表。當您/客戶有多個決策者時，每個決策者應分別填寫此評估表的副本，並且以最保守的評估表為准。

The information that you/the client provided will form the basis of our assessment. It is important for you/the client to provide valid, true, accurate, up-to-date and complete information to make reasonable suitability assessment according to your/the client's financial situation & needs, investment experience, investment objectives & horizon, liquidity risk appetite and risk tolerance level. Failure in doing so would affect the result of the suitability assessment.
您/客戶所提供的資訊將成為我們評估的基礎。請務必提供有效、真實、準確、最新和完整的資訊，以便根據您/客戶的財務狀況、投資需求和目標做出合理的產品合適性評估。如果不這樣做，將影響適宜性評估的結果。

If you/the client are/is aged 65 or above or have an education level of Primary 6 or below, or have an investable assets of HK$100,000 or below, you/the client are/is strongly advised to visit our office and be accompanied by a family member, a close relative or a friend (each hereinafter called a "Companion/Witness") to complete this form. If you/the client complete this Assessment Form on your own/self and return this Assessment Form to us, we will deem that you/the client DO NOT require to be accompanied by any Companion for completing this Assessment Form.
如果您/客戶年滿 65 歲,或具有小學 6 年級或以下的學歷, 或擁有 10 萬港元或以下的可投資資產，建議您/客戶到本公司的總部，在家庭成員、近親或朋友(統稱為"見證人"/"伴侶") 的陪同下完成此評估表。如果您/客戶親自填寫並返回此評估表，我們將視為您/客戶不需要任何見證人/伴侶陪同下進行此評估表。

Please answer the following questions by reference to your/the client's general attitude towards making investments, and NOT by reference to your/the client's attitude towards investing in any particular investment product.
請參考您/客戶對投資的一般態度回答以下問題，而不是參考您/客戶對投資任何特定投資產品的態度。

When answering questions about your/the client's financial or investment information, such as the amount of investable assets, or transactions of securities, please refer to ALL your/the client's holdings and transactions in GCINT (HK) as well as those in other banks, securities firms and financial institutions, and not solely those in GCINT (HK). 在回答有關您/客戶的金融或投資資訊 (如可投資資產金額或證券交易) 的問題時，請參考您/客戶在金禧國際證券的所有持股和交易，以及包括在其他銀行、證券公司和金融機構，而不僅僅只在金禧國際證券的所持有。

If there is any change in circumstances which may affect your/the client's answers to the questions herein (including but not limited to investment objectives, investment horizon, liquidity needs, financial situation, financial needs, risk appetite, risk tolerance level materially, etc.) , you/the client should contact your/the client's designated account executive or our investment service licensed officer to re-conduct assessment herein.
如果情況發生任何變化，可能會影響您/客戶對此處問題的回答（包括但不限於投資目標，投資期限，流動性需求，財務狀況，財務需求，風險偏好，風險承受水平等），您/客戶應聯繫您/客戶指定的客戶經理或我們的投資服務人員，以便在此重新進行評估。

Capitalised terms not defined on this Assessment Form shall have the same meaning as the Terms and Conditions For Securities Trading and Futures And Options Trading of GCINT (HK) Limited respectively and where applicable.
本評估表中未定義的資本化術語與金禧國際證券(香港)有限公司的證券交易的條款和條件分別具有相同的含義，並在適用的情況下。

Should there are any inconsistencies between the English version and the Chinese version of this Assessment Form, the English version shall prevail.
如果此評估表的英文版與中文版有任何不一致之處，則以英文版本為準。

PART I – PERSONAL CIRCUMSTANCES

(including financial needs & situation analysis, investment objective & horizon, investment knowledge and experience, risk tolerance, etc.)

第一部份 - 個人資料

（包括財務需求和情況分析，投資目標和視野，投資知識和經驗，風險承受能力等。）

Full Name (printed on passport/HKID card) : ____

中文全名（印在護照/香港身份證上）

HKID / Passport Number : ____

香港身份證/護照號碼

Able to read and understand 能夠閱讀和理解：

☐ English 英語 ☐ Chinese 中文 ☐ Both 英語和中文

Employment status 就業狀況：

☐ Working 工作中 ☐ Housewife 家庭主婦 ☐ Full-Time Student 全職學生 ☐ Unemployed 無業 ☐ Retired 退休

Expected Source of Fund 預期資金來源：

☐ Salary Income of client 客戶工資收入 ☐ Income from business of client 客戶業務收入 ☐ Investment Income 投資收益 ☐ Inheritance 遺產繼承 ☐ Others (Please specify): 其他: ____________

Pick one of the following that best describes your current and future earning sources:

選擇以下最適當描述您當前和未來收入來源的狀況

☐ I/We expect my/our earnings to decrease (due to retirement, economy, etc) 我/我們預料收入將減少（因為退休，經濟狀況等）

☐ I/We expect my/our earnings to remain stagnant (increment does not keep in pace with inflation, or minimal increment) 我/我們預料收入將停滯不前（增薪跟不上通脹或小幅度增薪）

☐ I/We expect my/our earnings to increase in pace with inflation 我/我們預料收入將與通脹同步增長

☐ I/We expect my/our earnings increase to outpace inflation 我/我們預料收入將增長超越通脹

What is/are the purpose of your investments? *(you may choose more than one)* **您的投資目的是什麼？**（您可以選擇多個）

☐ To get life protection 確保生活保障 ☐ To beat inflation 克服通脹 ☐ To generate steady income 創造穩定的收入 ☐ To meet personal goals such as wedding, vacation, etc. 實現個人目標，如婚禮，度假旅遊等。

☐ For children's education 兒女的教育基金 ☐ For home purchase 家具物品消費 ☐ For retirement 退休基金

A1) Age group 年齡組別：

☐ a. Under 20 20 歲以下 ☐ b. 21-35 21-35 歲 ☐ c. 36-50 36-50 歲 ☐ d. 51-65 51-65 歲 ☐ e. 66 or above 66 歲或以上

A2) Education 教育程度：

☐ a. Primary or below 小學或以下 ☐ b. Secondary 中學 ☐ c. Post-secondary 預科 ☐ d. University 大學 ☐ e. Master or above 碩士或以上

A3) What is the net asset value (NAV) of your investable assets (It equals the sum of your investment portfolio and cash [excluding the value of properties] net of personal loans and credit card balances)?

您的可投資資產的淨資產價值(NAV) 是多少(它等於您的投資組合和現金[不包括房產價值] 扣除個人貸款和信用卡餘額的總和)？

☐ a. Below HK$100,000 100,000 港元以下 ☐ b. HK$100,001 to HK$500,000 100,001 港元至 500,000 港元 ☐ c. HK$500,001 to HK$1,000,000 500,001 港元至 1,000,000 港元 ☐ d. HK$1,000,001 to HK$5,000,000 1,000,001 港元至 5,000,000 港元 ☐ e. Over HK$5,000,001 or above 5,000,001 港元或以上

A4) Average annual income 年均收入：

☐ a. Below HK$100,000 100,000 港元以下 ☐ b. HK$100,001 to HK$200,000 100,001 港元至 200,000 港元 ☐ c. HK$200,001 to HK$500,000 200,001 港元至 500,000 港元 ☐ d. HK$500,001 to HK$1,000,000 500,000 港元至 1,000,000 港元 ☐ e. Over HK$1,000,001 or above 1,000,001 港元或以上

A5) What is your planned investment amount over your total net assets? 您所計劃投資的金額佔您的資產淨值總額比例為多少？

☐ a. Below 10% 少於 10%　☐ b. 10% to <40% 10% 至 <40%　☐ c. 40% to <70% 40% 至 <70%　☐ d. 70% to <100% 70% 至 <100%　☐ e. 100% 100%

INVESTMENT OBJECTIVE AND EXPERIENCE 投資目標和經驗

A6) What is your general investment goal? 您的投資目標是什麼？

☐ a. Capital preservation other than bank deposits 作為銀行存款以外的保本工具

☐ b. Slightly higher return than time deposits while keeping risk exposure to minimal 尋求較定期存款略高的回報，同時將風險維持在最低水平

☐ c. Stable return with balanced risk 尋求平穩回報，並同時平衡風險水平

☐ d. Long term capital appreciation by taking higher level of risk 旨在實現長期資本增值，並能夠承擔較高風險

☐ e. Derive significant return by taking high risk 希望取得豐厚回報，並能夠承擔高風險

A7) How many year(s) of investment experience do you have? 您擁有多少年的投資經驗？

☐ a. NIL 無　☐ b. Below 1 year 少於 1 年　☐ c. 1 year to <2 years 1 年至 <2 年　☐ d. 2 years to <5 years 2 年至 <5 年　☐ e. 5 years or above 5 年或以上

A8) How many transaction(s) will you trade per annum? 您平均每年的投資交易數量為多少？

☐ a. NIL 無　☐ b. Below 5 少於 5 宗　☐ c. 5 to 20 5 至 20 宗　☐ d. 21 - 40 21 至 40 宗　☐ e. Over 41 41 宗或以上

A9) What is the level of fluctuation would you be comfortable with in general? 您能承受的波幅為多少？

☐ a. <±5% <±5%　☐ b. <±10% <±10%　☐ c. <±20% <±20%　☐ d. <±30% <±30%　☐ e. ±30% or more ±30% 或以上

A10) How would you react if your invested securities lost over 20% of the total value within a short period of time?
如果您投資的證券在短期內虧損 20%，您會如何應對？

☐ a. Sell all securities 沽出所有證券　☐ b. Sell some securities 沽出部份證券　☐ c. Do nothing 不採取任何行動　☐ d. Buy some securities 買入部份證券　☐ e. Buy more securities 趁低增持證券

A11) Do you have any general knowledge of derivative products? 您對衍生產品有一般的了解嗎？

☐ **YES**, I have general knowledge of derivatives. **PLEASE GO TO PART II**
有的，我對衍生產品有一般的了解。**請填寫第二部份**

☐ **NO**, I do not have any general knowledge about the risks and nature of derivative products. **PLEASE GO TO CLIENT ACKNOWLEDGEMENT**
沒有，我對衍生產品的風險和性質一無所知。 **請跳至下部分 - 客戶確認**

PART II – DERIVATIVE KNOWLEDGE ASSESSMENT
第二部分 - 衍生知識評估

B1) I have traded the following derivative product(s) in the past 3 years. (Please answer all the products listed below by a tick even if you have no trade experience) **在過去的3年內, 我有交易過以下的任何衍生產品。**（即使您沒有交易經驗，也請回答下面列出的所有產品）

Product Category 產品種類	A: No trading 沒有交易	B: Yes, < 5 times 是的，少於 5 次	C: Yes, =/>5 times 是的，多於 5 次	If answer is C, roughly how many trades in total for respective product category in the past 3 years? 如果答案是 C，那麼過去 3 年中各產品類別的交易宗數為多少？
I.) Warrants / Options / Futures /Callable Bull Bear Contracts/ Forwards/Swaps 認股證/期權/期貨/牛熊證/遠期合約/掉期交易	☐	☐	☐	
II.) Bond derivatives and bond structured products 債券衍生品和債券結構產品	☐	☐	☐	
III.) Foreign exchange derivatives 外匯衍生品	☐	☐	☐	
IV.) Equity derivatives 股權衍生品	☐	☐	☐	

V.) Derivatives funds 衍生品基金	☐	☐	☐	
VI.) Interest rate and Credit derivatives 利率和信用衍生品	☐	☐	☐	
VII.) Other derivatives 其他	☐	☐	☐	

Product Category I to VII are derivative products. You will be regarded as having general derivative knowledge per SFC Code of Conduct paragraph 5.1A, if you have traded any of the product(s) mentioned above under the product category at least 5 times in the past 3 years. **產品類別 I 至 VII** 為衍生產品。 如果您在過去的3年內至少交易過5次上述任何衍生產品，根據 SFC 操守準則第 5.1A 段，您將被視為具有一般對衍生產品的了解。

B2) I have taken training (e.g. training video, seminar, online training or attended course(s)) on derivative products or other products.
我參加了培訓（例如:培訓視頻，研討會，在線培訓等）或參加過衍生產品的課程。

☐ Banks 銀行
☐ Financial Institutions 金融機構
☐ Educational Institutions/University 教育機構/大學
☐ HK Securities Institute 香港證券專業學會
☐ Professional financial qualifications 專業財務資格

B3) Others:
其他：______________________________

PART III. SUITABILITY ASSESSMENT 第三部份: 合適性評估

Please complete the information below in order to document the rationale of EACH investment advice provided to client. 請填寫以下資料，以載明向客戶所作出的每項投資建議的依據。

Client's Personal Circumstances 客戶的個人情況		Investment Product Details 投資產品資料		Assessment 評估
Client Code: 客戶編號:		**Name of Investment Product: 投資產品名稱:**		
Client Name: 客戶名稱:		**Issuer Name: 發行人名稱:**		Any account holder / ultimate beneficial owner(s) being classified as "Vulnerable Client?" 該客戶或帳戶中的實益擁有人是否被界定為"容易受損客戶"? ☐ Yes 有 ☐ No 沒有
Date of Customer Risk Profiling Questionnaire Completed: 風險承受能力問卷填寫日期:		**Date of Product Due Diligence: 產品盡職審查日期:**		
Client Risk Category 客戶風險級別	☐ Conservative 保守型 ☐ Stable 穩健型 ☐ Balance 平穩型 ☐ Growth 增長型 ☐ Aggressive 進取型	**Product Risk Category 產品風險級別**	☐ Low 低 ☐ Relatively Low 次低 ☐ Moderate 中 ☐ High 高 ☐ Very High 非常高	☐ Matched 匹配 ☐ Mismatched 不匹配
Client Characterization 客戶分類	☐ P.I. 專業投資者 ☐ Non-P.I. 非專業投資者	**Selling Restrictions 銷售限制**	☐ P.I. Only 只限專業投資者 ☐ Suitable for All Clients 適合所有客戶	☐ Matched 匹配 ☐ Mismatched 不匹配
Investment Horizon 投資年期	Years	**Product remaining Tenor 年期**	Years	☐ Matched 匹配 ☐ Mismatched 不匹配

Derivatives Knowledge 衍生產品知識	☐ Yes 有 ☐ No 沒有	**Embedded with Derivatives Features 具有衍生產品特徵**	☐ Yes 有 ☐ No 沒有	☐ Matched 匹配 ☐ Mismatched 不匹配
Trading Experience in respective Product 產品投資經驗	☐ None 沒有經驗 ☐ Have experience 有經驗	**Product Complexity 產品複雜性**	☐ Simple 簡單 ☐ Complex 複雜	☐ Matched 匹配 ☐ Mismatched 不匹配
Market Experience in respective market 相關市場投資經驗	☐ None 沒有經驗 ☐ Have experience 有經驗	**Emerging or Frontier Market 新興 / 前沿市場**	☐ No 否 ☐ Yes 是	☐ Matched 匹配 ☐ Mismatched 不匹配
High Concentration (Asset class > threshold of client total asset) 資產高度集中 (該資產類別超過客戶所申報總流動資產的特定比例)	☐ Yes 有 ☐ No 沒有 If Yes, provide warning to client and obtain client's verbal / written acknowledgement	**Overall Assessment Result 總體評估結果**	☐ Matched 匹配 ☐ Mismatched 不匹配 (Please complete Part II) (Note 1)	

Rationale for recommending the Investment Product to the Client
向客戶推介此投資產品的理由：

☐ The product fits with client's investment strategy and risk profile in terms of investment knowledge/experience, market experience, investment horizon and/or investment needs 該產品在投資知識/經驗，市場經驗，投資期限和/或投資需求方面符合客戶的投資策略和風險狀況

☐ The product helps to diversify client's portfolio in terms of assets allocation 該產品有助於客戶在資產組合配置方面分散投資

☐ The product hedges client's portfolio e.g. currency, interest rate, country, concentration and/or other risks 該產品對沖客戶的投資組合如在貨幣，利率，國家，集中度和/或其他方面風險

☐ The product recommendation is consistent with investment directions previously agreed with client (such as client's expressed intention to invest in a particular sector, country/region, currency, product class etc.) 此產品推薦符合之前與客戶商定的投資方向（例如：客戶表示其打算投資的特定行業，國家/地區，貨幣，產品類別等）

☐ Others (please specify) 其他 (請註明)

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IMPORTANT NOTE: The following should be considered for determining the rationale:-
重要提示：應考慮以下資料，為確立投資推介的理由：

a. Client's circumstances (e.g. investment experience / knowledge of the transaction / products, financial situations, portfolio allocation etc). 客戶的情況（例如交易 / 產品的投資知識 / 經驗，財務狀況，投資組合分配等）。
b. Agreed parameters with the client (e.g. maximum loss, investment horizon, investment objective, overall portfolio, leverage arrangement etc). 與客戶商定的參數（例如最大損失，投資期限，投資目標，整體投資組合，槓桿安排等）。
c. Research / analyses conducted indicating that the transaction / products would meet the agreed parameters and the client's circumstances. 研究 / 分析表明，交易 / 產品將符合商定的參數和客戶的情況。
d. The risk level of the transaction / product. 交易 / 產品的風險等級。

Signature of Account Executive / Salesperson 客戶經理/銷售人員簽署:

Name 姓名：

CE No. 中央編號：

Date 日期：

Details of Solicitation / Recommendation and Sales Process 投資推介內容及銷售過程：

	Date 日 期	**Time 時 間**	**Details 內 容**
1			
2			
3			
4			
5			
6			
7			
8			☐ Product key-fact-sheet (“KFS”) / terms-sheet and/or offering document and prospectus have been provided to client. 已經向客戶提供了產品資料概要（“KFS”）/ 條款細則 和/或 銷售文件及招股書。 ☐ Monetary Benefits has been disclosed to client 金錢收益已經向客戶披露。 ☐ Warning of High Concentration has been provided to client and obtained client's verbal / written acknowledgement. (If applicable) 已提醒客戶其資產配置高度集中於此產品類別，並已獲取客戶口頭或書面確認同意有關配置。(如適用)

PART VI. CLIENT'S ACKNGWLEDGEMENT OF INVESTMENT PROFILE SUITABILITY MISMATCH

第四部份 客戶確認投資取向/風險概況適當性不匹配的情況(註)

Note: This part is not applicable for mismatch in Selling Restriction and Derivative Knowledge

註：本部分不適用於銷售限制與**衍生產品知識**不匹配。

Reasons for investing in this investment product 客戶投資於此產品的原因：

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Client Acknowledgement 客戶確認

I/We understand, acknowledge and agree that:

This Assessment Form is designed for me/the client to understand my/the client's financial situation, investment experience, investment objectives, risk appetite and risk tolerance level. I/We declare that I/we have read and understood the questions on this Assessment Form. I/We hereby confirm that all the answers to the questions in this Assessment Form were provided by me/us and are true, accurate, correct, complete and up-to-date to the best of my/the client's knowledge. I/We hereby further acknowledge, confirm and agree if there are any discrepancies between the risk profile generated by the objective assessment per results from this Assessment Form and Self-Declared Risk Tolerance filled in by me/us in the Account Opening Documents 2(d) and Customer Due Diligence Regular Review Form (part 1). GCINT (HK) shall rely on the more conservative result between the assessment result and self-declared risk tolerance. I/We have read and filled in the Assessment Form and understand the risk tolerance level that I/the client belong to and consent to the results of the assigned risk profile being documented by GCINT (HK). If there is any change in circumstances which may affect my/the client's answers to the questions herein (including but not limited to investment objectives, investment horizon, liquidity needs, financial situation, financial needs, risk appetite, risk tolerance level materially, etc.), I/We should contact my/the client's designated account executive or my/the client's investment service licensed officer to re-conduct assessment herein.

本人／我們了解，確認及同意：

本客戶投資風險評估表（ "評估表" ）的設計和實施旨在幫助金禧國際證券(香港)有限公司（統稱為"金禧國際證券" ）的潛在和現有客戶了解其投資目標以及他們的風險偏好和風險承受能力。我/我們聲明我/我們已閱讀並理解本評估表。我/我們在此確認本評估表中所有問題的答案均由我/我們提供，並且我/我們的知識是真實，準確和完整的。我/我們在此承認，確認並同意，如果客觀評估產生的風險概況與自我聲明的風險承受能力(帳戶開戶文件 2(d)與客戶盡職調查年度審核表(part 1))之間存在任何差異，金禧國際證券將依賴於評估結果與自我聲明的風險承受能力之間更為保守的結果。我/我們已閱讀並填寫評估表並了解我/我們所屬的風險承受水平，並同意金禧國際證券記錄的指定投資概況的結果。如果情況發生任何變化，可能會影響我/我們對此處問題的回答（包括但不限於投資目標，投資期限，流動性需求，財務狀況，財務需求，風險偏好，風險承受水平等），我/我們應聯繫我/我們指 定的客戶經理或我/我們的投資服務人員，以便在此重新進行評估。

- Witness: I (Witness of the client) acknowledge that
- 見證人：我（客戶見證人）承認這一點
  1. I accompanied the client conducting this Assessment Form and;
     我陪同客戶進行此評估表和;
  2. The client read and fully understood this Assessment Form and completed this Assessment Form with answers voluntarily provided by the client.
     客戶閱讀並完全理解本評估表，並填寫本評估表，並附上客戶自願提供的答案。

☐ **No Witness**: I (the client) **DO NOT** require any family member, close relative or friend to accompany me while conducting this Assessment Form.

☐ **沒有見證人**：我（客戶）在執行本評估表時，**不要求**任何家庭成員，近親或朋友陪伴我。

For individual/respective holder under a joint account (each respective joint account holder completes one Assessment Form separately and respectively)/corporate account*

Client's Witness Signature:
客戶見證人簽署：

Client Signature:
客戶簽署：

____

Client's Witness Name:
客戶見證人姓名
(HKID/Passport no. 身份證／護照編號：)
Relationship with the client:
與客戶的關係:______________________________

Date 日期: ______________________________

____

Title: Mr / Miss / Mrs / Ms
先生/小姐/夫人/女士
Client Name:
客戶名稱
(HKID/Passport no. 身份證／護照編號：)

For corporate account holder
Signature and company chop:
對於公司帳戶持有人
簽名和公司印章:

Date 日期: ______________________________

Internal Use - Scoring System of Investor Suitability Assessment Form

	a	b	c	d	e
A1	0	1	2	3	0
A2	0	1	2	3	4
A3	0	1	2	3	4
A4	0	1	2	3	4
A5	0	1	2	3	4
A6	0	1	2	3	4
A7	0	1	2	3	4
A8	0	1	2	3	4
A9	0	1	2	3	4
A10	0	1	2	3	4

Risk Level and Implication 風險水平及涵義

Risk Profile 風險承受	Risk Appetite 風險等級	Risk Score 風險評分	Implications 涵義	Suitable investment types 適合的投資類型	Product 投資產品
Conservative 保守型	Low 低風險	0 – 19	An investor who is risk-averse and to whom capital preservation is very important. 投資者對風險採取比較保守的態度及重視保存資本。	Hong Kong listed common stocks (blue chips, GEM, H-shares) and Treasury bonds (investment grade), etc. 普通股（ 藍籌股， 創業板，H股）和國債（投資級）等	**Non- complex product** **"非複雜"的投資產品**
Aggressive 進取型	High 高風險	20 - 39	An Investor who would like to have significant capital gain, and he/she understands that he/she needs to take a very high level of risk in respect of the capital invested. 投資者喜愛有可觀資本增值的投資，同時亦明白到要承擔相當高的風險。	Overseas stocks, Non-investment grade bonds, Derivative warrants, CBBC and Futures/Options, etc. 海外股票，非投資級債券，衍生權證，牛熊證及期貨/期權等	**Complex product** **"複雜"的投資產品**

Signature of Licensed Person: ____________________
持牌人士簽署

Name of Licensed Person:____________________(CE No. 中央編號 :   )
持牌人士姓名

Position:____________________ Date: ____________________
職位 日期

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Derivative Knowledge	☐ YES ☐ NO	**Risk Profile**	☐ Conservative ☐ Aggressive
Training		**Products**	☐ Non-complex ☐ Complex
Sales Personnel/AE	Reviewed by	Approved by RO	Inputted by