

# Investor Demographic Assessment

Date: [Insert Date]

Dear [Investor's Name],

We are conducting an Investor Demographic Assessment to better understand our investors and tailor our services accordingly. Your feedback is invaluable to us.

Please take a moment to provide insight into the following areas:

- **Age Group:** [18-24, 25-34, 35-44, 45-54, 55+]
- **Investment Experience:** [Beginner, Intermediate, Advanced]
- **Investment Goals:** [Retirement, Wealth Accumulation, Income Generation, Other]
- **Preferred Investment Types:** [Stocks, Bonds, Real Estate, Mutual Funds, Other]

Your participation is voluntary, and all responses will remain confidential. Please respond by [insert deadline].

Thank you for your time and support.

Sincerely,

[Your Name]

[Your Position]

[Your Company]

[Contact Information]