

# *Client Segmentation Profile*

*Your Company Name:*

This document is for internal use by advisers only.

## *A Clients*

Target annual renewal income:

Minimum investment assets::

Minimum Earnings:

Notes:

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## *B Clients*

Target annual renewal income:

Minimum investment assets::

Minimum Earnings:

Notes:

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## *C Clients*

Target annual renewal income:

Minimum investment assets::

Minimum Earnings:

Notes:

*Advise Better*  
*Live Better*