

VAN HULZEN ASSET MANAGEMENT



Portfolio Review Template

Please list your individual holdings (names, tickers or cusips) and either the current value of each position or the size as a percentage of the total portfolio. We will review your portfolio, summarize what we believe it says about your market outlook and risk profile, and (if applicable) suggest some potential changes you might make in order to improve the overall quality of your holdings. We will also make ourselves available in case you'd like to discuss our findings and/or additional next steps.

Security

Amount (or Percent of Total Portfolio)
