

# Risk Profiling Questionnaire

Client Name:

Date:

On a scale of 1-10, how would you rate yourself as an investor?

	Minimize losses and fluctuation			Accept some fluctuation for growth				Maximum accumulation regardless of loss		
Self	1	2	3	4	5	6	7	8	9	10
Spouse	1	2	3	4	5	6	7	8	9	10

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Record Score
I would like to emphasize long-term growth for my investment funds, even if it means sharp ups and downs on a year-to-year basis.	5	4	3	2	1	
Protecting my savings is more important than making it grow.	1	2	3	4	5	
It would trouble me more if I did not invest and the market went up than if I did invest and the market went down.	5	4	3	2	1	
If I inherited a large sum of money, I'd put it in the bank rather than invest it.	1	2	3	4	5	
Short-term losses are acceptable if I believe that the long-term returns will be good.	5	4	3	2	1	
I prefer an investment strategy designed to grow steadily and avoid sharp ups and downs, even if it lowers the long-term results.	1	2	3	4	5	
My time frame for wanting to reach my financial goals is:	Over 20 Years 5	11-20 Years 4	6-10 Years 3	1-5 Years 2	Already Reached 1	
My age is:	Over 60 1	55-65 2	40-55 3	25-39 4	Under 25 5	
<b>SCORE:</b> 8-17 = Conservative	18-32 = Moderate				over 32 = Aggressive	<b>GRAND TOTAL</b>