

# Risk Tolerance Questionnaire

1. The investment I am now considering represents the following percentage of my total investment portfolio.	80-100%	60-80%	40-60%	20-40%	20% or less
2. In how many years do you expect to start spending the money you're investing?	1 Year	2-5 Years	6-10 Years	11-20 Years	21+ Years
3. I do not foresee any major expenses that might cause me to make withdrawals from this investment before that time.	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
4. When I start making withdrawals from this investment, they will be used to fund my living expenses.	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
5. When it comes to investing, protecting the money I have is my highest priority.	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
6. I always choose investments with the highest possible return.	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
7. I prefer an investment strategy designed to grow steadily and avoid sharp ups and downs.	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
8. To meet my financial goals, my investments must grow at a high rate of return.	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
9. I am unwilling to wait several years to recover from losses I incur in an extended down market.	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
10. I prefer investments that are low risk, even if returns are lower than the rate of inflation.	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree

