



Risk Tolerance Questionnaire

Take a few minutes to complete this short questionnaire, which will create a recommended portfolio with the appropriate mix of assets. The score reflects the level of risk you're willing to take in your investment decisions.

1. If you own a home, do you have more than 30% equity?
 - No
 - Yes
 - I don't own a home

2. Which of the following best describes your current employment situation?
 - Full-Time
 - Part-Time
 - Retired
 - Unemployed

3. From an original investment of \$15,000, your portfolio now worth \$25,000 suddenly declines \$3,750 or 15%, which best describes your response?
 - I would look for a way to invest more
 - I would take no action
 - I would be somewhat concerned
 - I would avoid any investment that could suddenly lose 15% of its value (Choose last answer for next question)

4. Your portfolio, from previous question, now worth \$21,1250 suddenly declines another \$2,125 or 10%, which best describes your response?
 - I would look for a way to invest more
 - I would take no action
 - I would be somewhat concerned
 - I would probably sell
 - I would never have made this investment (Choose last answer on previous question)

5. Have you invested in Equities?
 - No
 - Yes

6. Have you invested in Fixed Incomes?
- No
 - Yes
7. Have you invested in Mutual Funds?
- No
 - Yes
8. Have you invested in Options, Futures or Derivatives?
- No
 - Yes
9. How would you describe your level of investment knowledge?
- None
 - Limited
 - Good
 - Extensive
10. How much investment experience do you have?
- None
 - Limited (1 to 3 years)
 - Good (4 to 5 years)
 - Extensive (more than 5 years)
11. Do you have current income needs from your investments?
- Yes
 - No
12. When will you begin to use your invested funds?
- Less than 2 years
 - 2 to 5 years
 - 6 to 10 years
 - More than 10 years

Jay Weyers and Scott McKeever are Registered Representatives and Investment Adviser Representatives of Equity Services, Inc. (ESI). Securities and Investment advisory services are offered solely through Registered Representatives and Investment Adviser Representatives of ESI, 123 N. Wacker Drive, Suite 600, Chicago, IL 60606 (312) 236 2500. ESI is independent of Weyers McKeever Financial Partners and eMoney. TC111155(1119)3