



## 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

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