

## Investor Profile Questionnaire

Section 1: Time Horizon		Section 2. Piels Telemanas				
1. I plan to begin withdrawing money from my			Section 2: Risk Tolerance 3. I would describe my knowledge of investments as:			
investments in:	,	None	0 0			
Less than 3 years	<u> </u>	Limited	O 2			
3-5 years	<b>O</b> 3	Good	O 4			
6-10 years	<b>O</b> 7	Extensive	O 6			
11 years or more	O 10					
		4. When I invest my money, I am:				
2. Once I begin withdrawing funds fro investments, I plan to spend all of the	•	Most concerned about losing value	O 0			
Less than 2 years	<b>O</b> 0	Equally concerned about losing or gaining value	<b>O</b> 4			
2-5 years	<u> </u>	Most concerned about gaining value	O 8			
6-10 years	<b>O</b> 4					
11 years or more	0 8	5. Select the investments you currently owned in the past with the highest num				
Subtotal: Time Horizon Score		Money market funds or cash investment	ts 0			
Enter the total points from questions	1 and 2.	Bonds and/or bond funds	<b>O</b> 3			
Time Horizon Score: point(s)		Stocks and/or stock funds	<u> </u>			
		International securities and/or funds	<b>8</b>			
A score of less than 3 indicates a very shall time horizon. For such a short time horizon low-risk portfolio of 40% short-term (ave	ort investmer zon, a relative erage maturity	past,you've purchased international s Yourpoint score would be 8.				
of five years or less) bonds and 60% cast as stock investments may be significantl in the shortterm.		6. Imagine that in the past three months, the overall stock market lost 25% of its value. An individual stock investment you own also lost 25% of its value.				
If your score is 3 or more, please cont	inue to	What would you do?				
Section 2.		Sell all of my shares	O 0			
		Sell some of my shares	O 2			
		Do nothing	O 5			
		Buy more shares	<b>O</b> 8			

## 7. Review the chart below.

We've outlined the most likely best– and worst– case annual returns of five hypothetical investment plans. Which range of possible outcomes is most acceptable to you?

The figures are hypothetical and do not represent the performance of any particular investments.

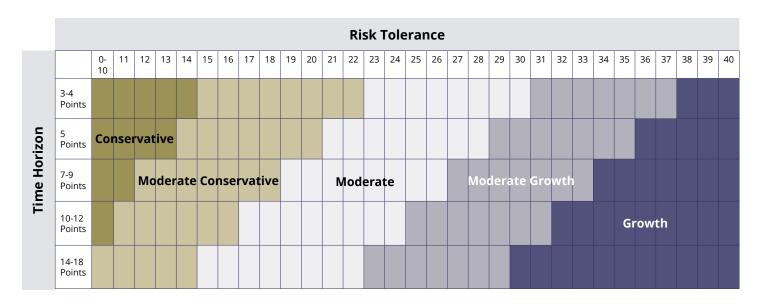
Plan	Average Annual Return	Best Case	Worst Case	Points
Α	4%	12%	-3%	0
В	6%	16%	-6%	3
С	8%	20%	-9%	6
D	10%	28%	-14%	8
Е	12%	40%	-24%	10

						_	
Subtotal	•	Risk	Γol	lerar	nce	Sco	re

Enter the total points for questions 3 through 7.

Risk Tolerance Score: \_\_\_\_\_ point(s)

Name(s):	
Account #:	
Your suggested mo	odel is:
Your preferred cho	vice is:
Client Signature(s):	Please type your name as your signature.
Advisor Signature:	Please type your name as your signature.  Please type your name as your signature.
Date:	



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