

# Risk Tolerance Questionnaire

If you own a home, do you have more than 30% equity?

- No  
 Yes

Which of the following best describes your current employment situation?

- Full-Time  
 Part-Time  
 Retired  
 Unemployed

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)

Your portfolio, from previous question, now worth \$21,250 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 (chosed last answer on previous question)

Have you invested in Equities?

- No  
 Yes

Have you invested in Fixed Incomes?

- No  
 Yes

*Projections are based on assumptions provided by the advisor/representative, and are not guaranteed. Actual results will vary, perhaps to a significant degree. The projected reports are hypothetical in nature and for illustrative purposes only. Consult your tax and/or legal advisor before implementing any tax or legal strategies.*

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Have you invested in Mutual Funds?

- No  
 Yes

Have you invested in Options, Futures, or Derivatives?

- No  
 Yes

How would you describe your level of investment knowledge?

- None  
 Limited  
 Good  
 Extensive

How much investment experience do you have?

- None  
 Limited (1 to 3 years)  
 Good (3 to 5 years)  
 Extensive ( > 5 years)

Do you have current income needs from this investment?

- Yes  
 No

When will you begin to use the money from your goal?

- Less than two years  
 Two to five years  
 Five to ten years  
 More than 10 years

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