Risk Tolerance Questionnaire

Risk Assessment

On a scale of 1-100 with 1 being the lowest and 100 the highest, how much risk are you willing to accept? Enter your score in the space provided. Compare yourself to other investors. The average risk score for all investors is 50. Two thirds of all investors score between 40 and 60, and only 1 in 1000 selects a score lower than 20 or greater than 80. Does your score feel right as you compare yourself to others?

Household Score _____ *Client* _____ *Spouse* _____

Investment Attitude Risk Questionnaire

Check the box next to the number to answer each of the six risk tolerance questions below.

1. How important is capital preservation?

Not at all			*Moderately important*					*Very important*
☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	☐ 6	☐ 7	☐ 8	☐ 9

2. How important is growth?

Not at all			*Moderately important*					*Very important*
☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	☐ 6	☐ 7	☐ 8	☐ 9

3. How important is low volatility?

Not at all			*Moderately important*					*Very important*
☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	☐ 6	☐ 7	☐ 8	☐ 9

4. How important is inflation protection?

Not at all			*Moderately important*					*Very important*
☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	☐ 6	☐ 7	☐ 8	☐ 9

5. How important is current cash flow?

Not at all			*Moderately important*					*Very important*
☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	☐ 6	☐ 7	☐ 8	☐ 9

6. How much risk are you willing to take to achieve a higher return?

Not at all			*A Moderate amount*					*A lot*
☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	☐ 6	☐ 7	☐ 8	☐ 9

What Average Annual Rate of Return* do you want to earn on your portfolio to reach your financial goals?

Average Annual Rate of Return* You Want: _____ %

* This rate of return is hypothetical and used for comparison purposes only. It is not related to any specific investment and there is no guarantee you will actually receive this rate.