

Attitude to Risk Profiler Questionnaire

When it comes to investing, how would you describe yourself?		
No understanding / knowledge	10	Y/N
Very little understanding / knowledge	20	Y/N
About as much understanding / knowledge as the next person	30	Y/N
A fair degree of understanding / knowledge	40	Y/N
A high level of understanding / knowledge	50	Y/N

If your investments dropped in value by 20% how would you react?		
Sell all of the remaining investments	10	Y/N
Sell a proportion of the remaining investments	20	Y/N
Hold the investments and do nothing	30	Y/N
Buy more of the same investments	40	Y/N

What are your main saving and investment goals?		
Immediate income	20	Y/N
Specific goals in 5 – 7 years	30	Y/N
Specific goals in 8 – 10 years	40	Y/N
Longer term growth (over 10 years)	50	Y/N

How would you compare yourself to others in taking financial risks?		
Much less willing to take risks than average	10	Y/N
Slightly less willing to take risks than average	20	Y/N
No more or less willing to take risks than the next person	30	Y/N
Slightly more willing to take risks than average	40	Y/N
Much more willing to take risks than average	50	Y/N

When you have made a significant financial decision, how do you feel?		
Very concerned	10	Y/N
Slightly concerned	20	Y/N
A little uneasy	30	Y/N
Confident	40	Y/N
Very confident	50	Y/N

If you had to choose from the following investments which would it be?		
A – never has a negative return and return between 0% to 3%	No loss	Y/N
B – has a negative return once every 12 years and returns -1% to 7%	10	Y/N
C – has a negative return once every 10 years and returns -2% to 9%	20	Y/N
D – has a negative return once every 8 years and returns -3% to 11%	30	Y/N
E – has a negative return once every 6 years and returns -4% to 13%	40	Y/N
F – has a negative return once every 4 years and returns -5% to 15%	50	Y/N

Attitude Risk Profiler Result:

The answers to the questions would lead to one of 6 portfolios

Up to 60	Risk Adverse
61 – 160	Low
161 – 180	Low/Medium
181 – 210	Medium
211 – 250	Medium/High
251 plus	High

TOTAL _____

