

Risk Tolerance Questionnaire

Investment Attitude Risk Questionnaire

Check the box next to the number in answer to each of the six risk tolerance questions below. These answers will help select your Asset Allocation Target Portfolio.

1. How important is capital preservation?

Not at all

 1 2 3 4 5 6 7 8 9

Moderately important

Very important

2. How important is growth?

Not at all

 1 2 3 4 5 6 7 8 9

Moderately important

Very important

3. How important is low volatility?

Not at all

 1 2 3 4 5 6 7 8 9

Moderately important

Very important

4. How important is inflation protection?

Not at all

 1 2 3 4 5 6 7 8 9

Moderately important

Very important

5. How important is current cash flow?

Not at all

 1 2 3 4 5 6 7 8 9

Moderately important

Very important

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

Not at all

 1 2 3 4 5 6 7 8 9

A Moderate amount

A lot

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

(Enter a number between 5% and 14%.)

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.