

Risk Tolerance Worksheet

- When you think of the word “risk” which of the following words come to mind first?
 Danger Opportunity
 Uncertainty Thrill
- Compared to people you know, how is your ability to handle financial stress?
- What’s your investment experience? Have you ever sold an investment because of a stock market decline?
- What is the likelihood you will be needing a large amount of cash soon?
- Are you easily influenced by the noise on T.V. (CNBC talking heads)?

If you are investing money with us, what is the time horizon of your investment? (Select one)

- Short (1-3 Years) Medium (4-6 Years) Long (7+ Years)

How aggressively should we invest your money? (Select one)

- Very Conservative Conservative Moderate Aggressive Very Aggressive

Are you looking more for growth or income? (Select one)

- Income Balanced Growth

Do you feel that you are more likely to have a positive or negative financial surprise in the future?

Please sign and date below:

Signature

Date

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