

# Portfolio Planning

## Risk Questionnaire

To use this questionnaire, please answer the 18 questions over the page and add up the scores to indicate a risk level using the table below.

Each person should use a separate form

**Total Score** (from answers)

**Risk Level** (from table)

Risk Level	Result	Lower	Upper
1	Very Cautious	18	32
2	Cautious	33	44
3	Balanced	45	56
4	Adventurous	57	64
5	Very Adventurous	65	90

Completed by:

Client signature \_\_\_\_\_ date \_\_\_\_\_

# Risk Profiler

		<b>Strongly agree</b>	<b>Agree</b>	<b>Neither Disagree nor agree</b>	<b>Disagree</b>	<b>Strongly disagree</b>
1.	I do not like to keep up to date on financial matters.	<i>Score</i> 1	2	3	4	5
		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2.	I am comfortable with the idea of my investments falling and rising rapidly.	5	4	3	2	1
		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
3.	I would describe my experience of investment as very limited.	<i>Score</i> 1	2	3	4	5
		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
4.	My knowledge of financial terms is very limited.	<i>Score</i> 1	2	3	4	5
		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
5.	Once I make an investment I hardly ever review it.	<i>Score</i> 1	2	3	4	5
		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
6.	I have sound financial experience to help me make an investment decision.	<i>Score</i> 5	4	3	2	1
		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
7.	I prefer having a long-term financial plan.	<i>Score</i> 5	4	3	2	1
		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

		<b>Strongly agree</b>	<b>Agree</b>	<b>Neither Disagree nor agree</b>	<b>Disagree</b>	<b>Strongly disagree</b>
	<i>Score</i>	<i>1</i>	<i>2</i>	<i>3</i>	<i>4</i>	<i>5</i>
<b>8.</b>	The thought of losing my money on an investment makes me nervous.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<i>Score</i>	<i>5</i>	<i>4</i>	<i>3</i>	<i>2</i>	<i>1</i>
<b>9.</b>	I like the excitement of investing in volatile foreign markets to potentially gain higher returns.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<i>Score</i>	<i>5</i>	<i>4</i>	<i>3</i>	<i>2</i>	<i>1</i>
<b>10.</b>	I try to make as much money as quickly as possible.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<i>Score</i>	<i>1</i>	<i>2</i>	<i>3</i>	<i>4</i>	<i>5</i>
<b>11.</b>	Most of the time, I do not read the financial section in my newspaper.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<i>Score</i>	<i>5</i>	<i>4</i>	<i>3</i>	<i>2</i>	<i>1</i>
<b>12.</b>	I am used to taking financial risk.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<i>Score</i>	<i>5</i>	<i>4</i>	<i>3</i>	<i>2</i>	<i>1</i>
<b>13.</b>	Financial press is a major influence on my investment decisions.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<i>Score</i>	<i>1</i>	<i>2</i>	<i>3</i>	<i>4</i>	<i>5</i>
<b>14.</b>	I prefer savings accounts to stock-market related investments.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

**Strongly agree**      **Agree**      **Neither Disagree nor agree**      **Disagree**      **Strongly disagree**

	<i>Score</i>	<i>1</i>	<i>2</i>	<i>3</i>	<i>4</i>	<i>5</i>
<b>15.</b> I would not like to invest in long-term investment as I wish to respond to changes in my budgetary requirements quickly.		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

	<i>Score</i>	<i>5</i>	<i>4</i>	<i>3</i>	<i>2</i>	<i>1</i>
<b>16.</b> I am prepared to take high risk in order to gain high returns.		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

	<i>Score</i>	<i>1</i>	<i>2</i>	<i>3</i>	<i>4</i>	<i>5</i>
<b>17.</b> I do not think of accumulating huge wealth through investments.		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

	<i>Score</i>	<i>5</i>	<i>4</i>	<i>3</i>	<i>2</i>	<i>1</i>
<b>18.</b> Had I been unlucky with investments in the past, I would make an investment again.		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Total Score