RISK TOLERANCE QUESTIONNAIRE

1. What is your current age?
   - Less than 45
   - 45 to 55
   - 56 to 65
   - 66 to 75
   - Older than 75

Time Horizon
Your current situation and future income needs

2. When do you expect to retire?
   - Not for at least 20 years
   - In 10 to 20 years
   - In 5 to 10 years
   - Not now, but within 5 years
   - Immediately

Long-Term Goals and Expectations
Your views of how an investment should perform over the long term

3. What is your goal for this investment?
   - To grow aggressively
   - To grow significantly
   - To grow moderately
   - To grow carefully
   - To avoid losing money

4. Assuming normal market conditions, what would you expect from this investment over time?
   - To generally keep pace with the stock market
   - To slightly trail the stock market, but make a good profit
   - To trail the stock market, but make a moderate profit
   - To have some stability, but make modest profits
   - To have a high degree of stability, but make small profit

5. Suppose the stock market performs unusually poorly over the next decade, what would you expect from this investment?
   - To lose money
   - To make very little or nothing
   - To make a little gain
   - To make a modest gain
   - To be little affected by what happens in the stock market

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6. Which of these statements would best describe your attitude about the next three years’ performance of this investment?
   o I don’t mind if I lose money
   o I can tolerate a loss
   o I can tolerate a small loss
   o I’d have a hard time stomaching any losses
   o I need to see at least some return

7. Which of these statements would best describe your attitude about the next three months’ performance of this investment?
   o Who cares? One calendar quarter means nothing
   o I wouldn’t worry about losses in that time frame
   o If I suffered a loss of greater than 10%, I’d get concerned
   o I can only tolerate small short-term losses
   o I’d have a hard time stomaching any losses

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Client Signature: ___________________________ Date: ___________________________