# Risk Profile Questionnaire

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| Name: |  |
| Phone Number: |  |
| Email Address: |  |
| Address: |  |
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1. What is your current occupation? How many years of work do you have left before retirement? What is your annual income? Do you have enough to cover all your current living expenses?

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1. How much money are you planning on initially investing? How will that change your current financial situation?

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1. What is the overall timeframe of this investment? How long will you be able to allow the investment to grow before you will need to withdraw some of the funds?

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1. How financially sound are you? Do you have a strong cushion?

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1. What is the planned cash flow for your investment, both in and out? Do you plan on adding significantly to it over time? How often will you need to make withdrawals?

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1. Do you foresee a significant change in your financial situation in the near future? (i.e. buying a house, paying for college, retiring from your job, medical expenses, travel, etc.)

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1. If you experienced a significant loss in your portfolio, what would you do? Would you sell, wait it out, invest more in anticipation of future growth, or some combination?

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1. What kind of tax savings do you want from your portfolio?

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1. How willing are you to risk your portfolio for a potential significant gain? What percentage of an investment are you comfortable with losing: 5%, 10%, 20%, or more?

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1. What is your overall objective for this investment? Is it to have retirement funds, save for a big expense, just have a cushion, or something else?

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1. How familiar are you with the market? What is your investment history?

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