# INVESTOR PROFILE OUIZ <br> What Type of Investor are you? 

1. What is your age?
$0-25$ years (6)
26-40 years (4)
41-54 years (3)
$55-65$ years
(2) $66+$ years (0)
2. How many years before you start withdrawing from your pension plan?
$0-2$ years (0)
$3-5$ years (2)
$6-10$ years (3)
$11-15$ years (4)
$16+$ years (6)
SCORE
3. I associate the word "RISK" with the idea of opportunity.

Strongly disagree (1) Disagree (2) No opinion (3) Agree (4)
Strongly agree (6)
4. If an investment loses money over the course of a year, can you easily resist the temptation to sell it? Strongly disagree (1) Disagree (2) No opinion (3) Agree (4)

Strongly agree (6)
5. My investment performance goal for long term investing is?
$0-2 \%(1) \quad 3-5 \%(2) \quad 6-7 \%(3) \quad 8-10 \%(4)$

I invest in CD's and / or keep my money in a savings account. (1)
l invest in mutual funds. (2)
I invest in mutual funds, stocks and bonds. (3)
I invest in the stock market directly. (5)
$11+\%(6)$
SCORE $\qquad$
$\qquad$

SCORE $\qquad$

Investor Profile - add up all six scores for your result

CONSERVATIVE 4-8 score


MODERATELY AGGRESSIVE $24-29$ score


MODERATE 18-23 score

- Fixed Income
- Equity

Money Market
MODERATELY CONSERVATIVE 9-11 score

- Fixed Income

Equity

- Money Market


OPTIMAL 12-17 score


DISCLAIMER: The risk model allocations are hypothetical in nature and are for illustrative purposes only. The suggested allocations based upon your Investor Profile quiz score do not represent actual securities or performance information. Should there be any changes in your financial circumstances, we do recommend a review on your investment strategy.

