

INVESTOR PROFILE QUIZ

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)

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) 3-5% (2) 6-7% (3) 8-10% (4) 11 + % (6)

6. Which statement best describes your current investment strategy?

I invest in CD's and / or keep my money in a savings account. (1)

I invest in mutual funds. (2)

I invest in mutual funds, stocks and bonds. (3)

I invest in the stock market directly. (5)

SCORE _____

SCORE _____

SCORE _____

SCORE _____

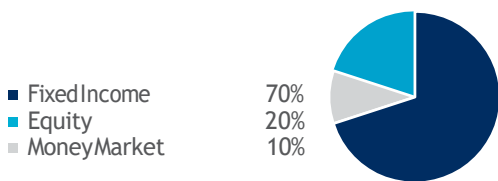
SCORE _____

SCORE _____

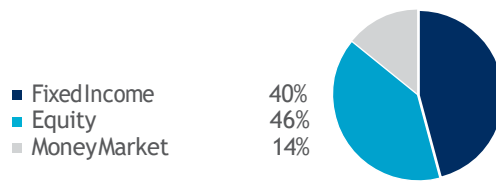
TOTAL SCORE _____

Investor Profile - add up all six scores for your result.

CONSERVATIVE 4-8score



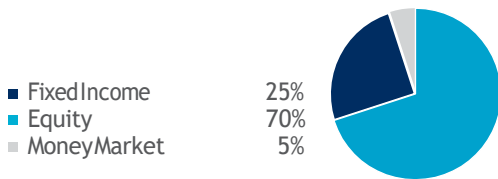
MODERATELY CONSERVATIVE 9-11 score



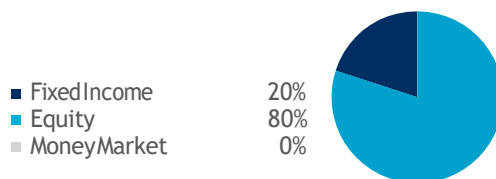
OPTIMAL 12-17 score



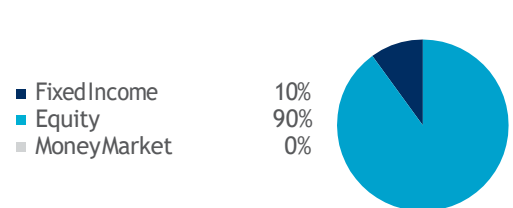
MODERATE 18-23score



MODERATELY AGGRESSIVE 24-29score



AGGRESSIVE 30-35score



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 of your investment strategy.