

## Risk Tolerance Questionnaire

1. How would you define yourself as an investor? Pick all that apply.

- a. I'm swinging for the fences!
- b. I'm a solid base-hitter.
- c. I'm a switch-hitter.
- d. I've never held a bat.

Pick one answer for each of the following questions.

2. What amount of your portfolio could you tolerate losing in any given month?

- a. 0%
- b. 5%
- c. 10%
- d. 15%
- e. 20%
- f. More

3. What amount of your portfolio could you tolerate losing in any given year?

- a. 0%
- b. 5%
- c. 10%
- d. 15%
- e. 20%
- f. 30%
- g. 40%
- h. 50%
- i. 75%
- j. More

4. How much could you tolerate losing over five years?

- a. 0%
- b. 5%
- c. 10%
- d. 15%
- e. 20%
- f. More

5. How much money could you handle losing, in any given year?

- a. None
- b. Very minimal
- c. A minimal amount, if the opportunities appear certain
- d. A minimal amount, if the opportunities appear promising
- e. A substantial amount, if the opportunities appear certain

- f. A substantial amount, if the opportunities appear promising
6. What action would you take if the stock market dropped 25 percent from its present value next week?
- a. Nothing
  - b. Sell everything I have left
  - c. Invest all the cash I can raise into the stock market
  - d. Borrow money to invest in the stock market
7. How many years of your financial independence or security are you willing to risk?
- a. None
  - b. One
  - c. Two
  - d. Three
  - e. Five
  - f. Ten
  - g. Whatever it takes (over ten)
8. Regarding your finances, what do you spend the most time thinking about?
- a. Will I have enough?
  - b. How can I earn more on my investments?
  - c. Could I be doing anything else smarter in regard to my personal finances?