

INVESTOR PROFILE QUESTIONNAIRE

Based on your personal situation and comfort level with investing, this questionnaire will help you select your investor profile. Answer these questions and use your total score to identify the corresponding profile that may be suited for your retirement investments.

	1 year	2-4 years	5-7 years	8-10 years	11+ years	Score
I expect to begin withdrawing money from my retirement account in:	1	2	3	4	5	

	I want a lump sum distribution	2-4 years	5-7 years	8-10 years	11+ years	Score
Once I begin withdrawing money from my retirement account, I expect the withdrawals to last:	1	2	3	4	5	

	Strongly agree	Agree	Neutral	Disagree	Strongly disagree	Score
I would take money out of my retirement account to pay for a large, unexpected expense.	1	2	3	4	5	
To meet my financial goals, my investments must grow at a high rate of return.	5	4	3	2	1	
I prefer investments that are a low risk, even if the returns are lower than the rate of inflation (the rise in prices over time).	1	2	3	4	5	
I prefer an investment strategy designed to grow steadily and avoid sharp ups and downs.	1	2	3	4	5	
When it comes to investing, protecting the money I have is my highest priority.	1	2	3	4	5	
I am unwilling to wait several years to recover from losses I could incur in an extended down market.	1	2	3	4	5	
I always choose investments with the highest possible return, even if the investments may frequently experience large declines in value because of higher risk.	5	4	3	2	1	
If I had \$1,000 invested in an account, and its value dropped to \$850 after six months, I would move all my money to a more conservative account.	1	2	3	4	5	

Note: These models are a guide to provide you with a basic understanding of what a suitable portfolio might look like. This is not intended to be investment advice.

TOTAL
