

# PORTFOLIO PLANNING

## Risk Questionnaire



To use this questionnaire, answer the 5 questions and add up the scores to indicate a risk level using the table below.

	Result	Lower	Upper
1	Safety First Investor	5	6
2	Cautious investor	7	8
3	Cautious investor	9	10
4	Balanced investor	11	12
5	Balanced investor	13	14
6	Balanced investor	15	17
7	Motivated investor	18	19
8	Motivated investor	20	21
9	Acquisitive investor	22	23
10	Acquisitive investor	24	25

Total Score  
From Answers

Risk Level  
From Table

	Score	Strongly Agree	Agree	Neither Disagree nor Agree	Disagree	Strongly Disagree
I try to make as much money as quickly as possible.	5	4	3	2	1	
		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
My knowledge of financial terms is very limited.	1	2	3	4	5	
		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
I like the excitement of investing in volatile foreign markets to potentially gain higher returns.	5	4	3	2	1	
		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
I am used to taking financial risk.	5	4	3	2	1	
		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Financial press is a major influence on my investment decisions.	5	4	3	2	1	
		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Total Score</b>		<input type="text"/>				

Completed by: \_\_\_\_\_ Client Signature: \_\_\_\_\_ Date: \_\_\_\_\_