

current retirement risk questionnaire

The following questionnaire has been designed to help you begin the planning process. Circle the number associated with the answer that best describes your situation.

<p>What is your current age?</p> <p>Over 79 0</p> <p>70-79 1</p> <p>60-69 2</p> <p>50-59 3</p> <p>Under 50 4</p>	<p>How many years worth of expenses are covered by other investment accounts?</p> <p>Less than 1 0</p> <p>Between 2 and 5 1</p> <p>Between 6 and 10 2</p> <p>More than 10 3</p>
<p>Over what time period do you judge investment performance?</p> <p>Monthly 1</p> <p>Quarterly 2</p> <p>Annually 3</p> <p>Over five years 4</p>	<p>Which statement best describes you?</p> <p><i>I would invest in something that offered:</i></p> <p>Some current income and is very safe 1</p> <p>High current income and has some risk 2</p> <p>Some current income, some appreciation and moderate risk 3</p> <p>A little income, high appreciation and high risk 4</p>
<p>Of the following groups of investments, which have you typically purchased in the past or would you consider purchasing? (Check all that apply)</p> <p>Bank CDs, T-Bills, Bonds 1</p> <p>Balanced (fixed-income and equities) 2</p> <p>Equities (blue chip and Fortune 500 companies) 3</p> <p>Equities (international and small stocks) 4</p>	<p>Currently, which statement best describes your situation? (include your spouse if applicable)</p> <p>Neither of you is covered by a health plan 1</p> <p>One of you is covered by a health plan 2</p> <p>Both of you are covered by a health plan 3</p>
<p>What percent of your monthly budget is covered by a pension? (include your spouse if applicable)</p> <p>0% 0</p> <p>Less than 30% 1</p> <p>Between 30% and 60% 2</p> <p>More than 60% 3</p>	<p>Currently, which statement best describes your situation? (include your spouse if applicable)</p> <p>Both of you are under the regular care of a physician and need prescription medications (s) 1</p> <p>One of you is under the regular care of a physician and need prescription medications (s) 2</p> <p>Neither of you is under the regular care of a physician nor need prescription medications (s) 3</p>
<p>What percent of your monthly budget is covered by Social Security? (include your spouse if applicable)</p> <p>Less than 20% 0</p> <p>Between 20% and 40% 1</p> <p>Between 40% and 60% 2</p> <p>More than 60% 3</p>	<p>The primary goal for this account is to:</p> <p>Support you and your spouse in retirement 1</p> <p>Support you and your spouse in retirement and leave an estate 2</p> <p>Support you and your spouse in retirement and leave a substantial estate 3</p> <p>Provide some support to you and your spouse and leave the primary amount to an estate 4</p>

SCORING

To compute your score, add all of the circled numbers together and refer to the range on the right to determine a suggested model portfolio. The Portfolio Mixes presented are a guide to investing and should not be considered investment advice. You may choose to allocate your assets based on these portfolio illustrations or design a portfolio mix of your own. Your investment professional can provide details regarding the specific allocation of these Portfolio Mixes. In applying any particular asset allocation model to your individual situation, you should consider all of your assets, income and investments.

TOTAL SCORE _____

SCORE	PORTFOLIO MIX
6-11	INCOME
12-18	INCOME & GROWTH
19-26	BALANCED
27-30	GROWTH & INCOME
31-33	GROWTH
34-35	AGGRESSIVE GROWTH

DISCLOSURE

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