

MULTIPLE GOALS 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.

What is your current age?

- Over 65 1
- 51 - 65 2
- 36 - 50 3
- 20 - 35 4

When do you first expect to access the money invested?

- Within 3 years 1
- Between 3 and 5 years 2
- Between 5 and 15 years 3
- More than 15 years 4

Over what time period do you judge investment performance?

- Monthly 1
- Quarterly 2
- Annually 3
- Over five years 4

How many months of living expenses are covered by your current liquid assets?

- Less than 3 months 1
- Between 3 and 6 months 2
- Between 6 and 12 months 3
- More than 12 months 4

Of the following groups of investments, which have you typically purchased in the past or would you consider purchasing? (Check all that apply)

- Bank CDs, T-Bills, Bonds 1
- Balanced (fixed-income and equities) 2
- Equities (blue chip Fortune 500 companies) 3
- Equities (international and small stocks) 4

How much do you expect your household income to change in the next few years?

- I expect it to decrease 1
- I expect it to be unchanged 2
- I expect it to increase moderately 3
- I expect it to increase dramatically 4

How optimistic are you about your financial future?

- Pessimistic 1
- Unsure 2
- Positive 3
- Very Optimistic 4

How much do you expect your investments to attain annually?

- 2 - 4% 1
- 4 - 6% 2
- 6 - 9% 3
- More than 9% 4

Which statement best describes you?

I would invest in something that offered:

- Some current income and is very safe 1
- High current income and has some risk 2
- High total return (some income and appreciation) and has substantial risk 3
- Substantial return (a little income and high appreciation) and has very high levels of risk 4

If you invested \$100,000 and shortly thereafter the market declined, at what point would you liquidate and move to a more stable investment?

- Immediately 1
- At \$90,000 2
- At \$75,000 3
- I would not sell and would wait for the market to turnaround regardless of the losses 4

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
10-12	INCOME
13-16	INCOME & GROWTH
17-22	BALANCED
23-30	GROWTH & INCOME
31-37	GROWTH
38-40	AGGRESSIVE GROWTH

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