

## RISK TOLERANCE ANALYSIS

For each question, circle the number that best reflects your response, with "1" being "strongly disagree" and "5" being "strongly agree."

1. **Investment Experience:** I have invested in stocks, bonds, and/or mutual funds in the past and am familiar with their inherent risks. 1 2 3 4 5
2. **High Capital Growth:** I seek a higher-than-average growth rate in the value of my portfolio and am willing to accept greater investment risk to do so. 1 2 3 4 5
3. **Beating Inflation:** I want to ensure that I am protected against the erosion of the future purchasing power of my investment assets because of inflation. 1 2 3 4 5
4. **Maximum Tax Deferral:** I want to minimize my current taxes by shifting my tax burden to later years. 1 2 3 4 5
5. **Low Current Income:** My investments do not need to generate a high level of spendable income (dividends and interest). 1 2 3 4 5
6. **Long-Term Oriented:** I would characterize my investment objectives and outlook as long term in nature (over 10 years). I am not concerned about the short term. 1 2 3 4 5
7. **High Volatility:** I would be willing to tolerate more volatility and risk of short-term loss in my investment portfolio in order to achieve a higher expected return in the long run. 1 2 3 4 5
8. **Investment Liquidity:** I do not need to readily convert my investment assets to cash. I have other funds available for meeting an emergency. 1 2 3 4 5
9. **High Volatility:** If the value of my portfolio decreased by 20% in one year, I would not be concerned about the temporary fluctuation in my investment. 1 2 3 4 5



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