

## 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



56757 Grand River Avenue | PO Box 374 | New Hudson | Michigan 48165 | Telephone (248) 932-9329 | IFS-LTD.COM

*Securities offered through registered representatives of Cambridge Investment Research, Inc. a broker-dealer, member FINRA/SIPC. Advisory services offered through Cambridge Investment Research Advisors, Inc. a registered investment advisor. Cambridge and Integrated Financial Strategies are not affiliated.*

*Investors should carefully consider the investment objectives, risks, fees and expenses before investing. For this and other important information please obtain the investment company fund prospectus and disclosure documents from your Rep/Advisor. Read this information carefully before investing.*