

Risk Tolerance Questionnaire

Tolerance for risk is a key consideration in determining your probable level of comfort with varying investing choices.

Risk Questionnaire		
Time Horizon Your current situation and future income needs.	1 What is your current age?	<input type="checkbox"/> Less than 45 <input type="checkbox"/> 45-55 <input type="checkbox"/> 56-65 <input type="checkbox"/> 66-75 <input type="checkbox"/> Older than 75
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2 When do you expect to start drawing income?		
<input type="checkbox"/> Not for at least 20 years <input type="checkbox"/> In 10 to 20 years <input type="checkbox"/> In 5 to 10 years <input type="checkbox"/> Not now, but within 5 years <input type="checkbox"/> Immediately		
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Long-Term Goals and Expectations Your views of how an investment should perform over the long term.	3 What is your goal for this investment?	<input type="checkbox"/> To grow aggressively <input type="checkbox"/> To grow significantly <input type="checkbox"/> To grow moderately <input type="checkbox"/> To grow with caution <input type="checkbox"/> To avoid losing money
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4 Assuming normal market conditions, what would you expect from this investment over time?		
<input type="checkbox"/> To generally keep pace with the stock market <input type="checkbox"/> To slightly trail the stock market, but make a good profit <input type="checkbox"/> To trail the stock market, but make a moderate profit <input type="checkbox"/> To have some stability, but make modest profits <input type="checkbox"/> To have a high degree of stability, but make small profits		
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5 Suppose the stock market performs unusually poorly over the next decade. What would you expect from this investment?		
<input type="checkbox"/> To lose money <input type="checkbox"/> To make very little or nothing <input type="checkbox"/> To eke out a little gain <input type="checkbox"/> To make a modest gain <input type="checkbox"/> To be little affected by what happens in the stock market		
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Short-Term Risk Attitudes Your attitude toward short-term volatility.	6 Which of these statements best describe your attitude about the next three years' performance of this investment?	<input type="checkbox"/> I don't mind if I lose money <input type="checkbox"/> I can tolerate a loss <input type="checkbox"/> I can tolerate a small loss <input type="checkbox"/> I'd have a hard time tolerating any losses <input type="checkbox"/> I need to see at least a little return
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7 Which of these statements best describe your attitude about the next three months' performance of this investment?		
<input type="checkbox"/> Who cares? One calendar quarter means nothing <input type="checkbox"/> I wouldn't worry about losses in that time frame <input type="checkbox"/> If I suffered a loss of greater than 10%, I'd get concerned <input type="checkbox"/> I can only tolerate small short-term losses <input type="checkbox"/> I'd have a hard time stomaching any losses		