

Risk Tolerance

To determine the proper Allocation for your Investment Portfolio, you must determine how much Volatility Risk you are willing to accept. This is called your Risk Tolerance.

Risk Tolerance Questionnaire

Answer the following questions to determine your Risk Tolerance.

1. How important is capital preservation?

Not at all

Moderately important

Very important

1 2 3 4 5 6 7 8 9

2. How important is growth?

Not at all

Moderately important

Very important

1 2 3 4 5 6 7 8 9

3. How important is low volatility?

Not at all

Moderately important

Very important

1 2 3 4 5 6 7 8 9

4. How important is inflation protection?

Not at all

Moderately important

Very important

1 2 3 4 5 6 7 8 9

5. How important is current cash flow?

Not at all

Moderately important

Very Important

1 2 3 4 5 6 7 8 9

6. How much risk are you willing to take to achieve a higher return?

None at all

A moderate amount

A lot

1 2 3 4 5 6 7 8 9