

Your Goals

 1. Retirement	 2. Wealth preservation	 3. More income
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Your Risk Tolerance

Risk tolerance is the assessment of how much risk you are willing to take given your personality.

Your risk tolerance score is 34 out of 100. That means, compared to a sample of people who have completed the questionnaire in the past, your score is below the average, which is 50. As a result you are less comfortable taking financial risks than most people.

34

Someone who scores 0 is extremely risk averse and is only comfortable investing in assets like cash and bonds. Someone who scores 100 is extremely risk willing and is comfortable investing entirely in growth assets like stocks.

Your score represents a low risk tolerance. People who score similarly to you may understand investing requires a longer term perspective but are averse to taking the risk. Investments can go up and down in value and they are very uncomfortable with this fact.

Your Risk Capacity

Risk capacity is the assessment of how much risk you can afford to take given your financial situation.

Very low	Low	Medium	High	Very high
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How long do you think you will remain invested before taking money out? **6 years**

How secure are your current sources of income (e.g. job, investment property)? **Secure**

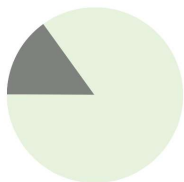
How secure do you feel funding an unexpected event like a job loss or a large medical bill? **Somewhat secure**

How would you describe your ability to save money? **Somewhat good**

Your Financial Situation

Existing investments

■ Stocks ■ Bonds ■ Cash
■ Investment Property ■ Other



Stocks - 15%
Bonds - %
Cash - 85%
Investment Property - %
Other - %

Age **64**

How much do you have to invest? **\$350,000**

What is your annual income? **\$203,000**

I am **somewhat good** at sticking with my investment plans.

Anything else we should know about your financial situation (optional)?