

4.0 Adviser Risk Profile Variation

As your adviser, I propose a variation from the risk profile that the questionnaire placed you in. I recommend we adopt the following risk profile for the reasons mentioned below.

Risk Profile		
	Client 1	Client 2
High Growth	<input type="checkbox"/>	<input type="checkbox"/>
Growth	<input type="checkbox"/>	<input type="checkbox"/>
Balanced	<input type="checkbox"/>	<input type="checkbox"/>
Conservative	<input type="checkbox"/>	<input type="checkbox"/>
Defensive	<input type="checkbox"/>	<input type="checkbox"/>

Reasons for proposed variation:

Client(s) response to the Adviser Risk Profile Variation

	Client 1	Client 2
I agree with the proposed adviser variation to the risk profile	<input type="checkbox"/>	<input type="checkbox"/>



If you are not comfortable with the proposed variation to your risk profile, you can instruct me as to the type of profile you would prefer

5.0 Client Risk Profile Variation

I disagree with the original risk profile or the adviser proposed variation to the risk profile and request to be placed in the following risk profile for the reasons mentioned below.

Risk Profile		
	Client 1	Client 2
High Growth	<input type="checkbox"/>	<input type="checkbox"/>
Growth	<input type="checkbox"/>	<input type="checkbox"/>
Balanced	<input type="checkbox"/>	<input type="checkbox"/>
Conservative	<input type="checkbox"/>	<input type="checkbox"/>
Defensive	<input type="checkbox"/>	<input type="checkbox"/>

Reasons for proposed variation:

Notes
