1.5.3	Have you had an investment fall in value? If so, how did it make you feel?			
a.	Unconcerned and anticipating future investment opportunities	1	☐	☐
b.	Unconcerned but not making any further investments	2	☐	☐
c.	Concerned	3	☐	☐
d.	Very concerned and asking friends and family about what I should do	4	☐	☐
e.	I have never experienced an investment fall in value and would not want to	5	☐	☐
1.5.4	What degree of risk are you prepared to take to achieve your desired return?			
a.	I want to maximise potential returns regardless of risk	1	☐	☐
b.	A high degree of risk would be acceptable for a large increase in potential returns	2	☐	☐
c.	A moderate degree of risk would be acceptable for a medium increase in potential returns	3	☐	☐
d.	A limited degree of risk would be acceptable for a slight increase in potential returns	4	☐	☐
e.	Security of capital is required regardless of potential returns	5	☐	☐
1.5.5	What are your future income requirements from your investments?			
a.	I require no amount of investment income as the focus should only be on capital growth	1	☐	☐
b.	I require a small amount of investment income as I am mainly concerned with capital growth	2	☐	☐
c.	I require an equal combination of investment income and capital growth	3	☐	☐
d.	I require a large amount of investment income with only some capital growth	4	☐	☐
e.	I require all of my investments to have a focus on income as capital growth is not required	5	☐	☐

1.6   Borrowed Money

		Point(s)	Client 1	Client 2
1.6.1	Have you ever borrowed money to make an investment?			
a.	I have borrowed money to invest in managed funds or direct shares or structured products	1	☐	☐
b.	I have only borrowed money to invest in an investment or rental property	3	☐	☐
c.	I have never borrowed money to invest outside my own home	5	☐	☐
1.6.2	Based on your answer to the previous question, how did borrowing to invest make you feel?			
a.	Very confident	1	☐	☐
b.	Confident	2	☐	☐
c.	Concerned	3	☐	☐
d.	Very concerned	4	☐	☐
e.	I have never borrowed money outside my own home	5	☐	☐

	Client 1	Client 2
Total Points		