

1.0 Risk Profile Questionnaire**1.1 Investment Risks**

	Point(s)	Client 1	Client 2
1.1.1 Compared to others, how would you rate your willingness to take financial risks?			
a. Very high risk taker	1	<input type="checkbox"/>	<input type="checkbox"/>
b. High risk taker	2	<input type="checkbox"/>	<input type="checkbox"/>
c. Average risk taker	3	<input type="checkbox"/>	<input type="checkbox"/>
d. Low risk taker	4	<input type="checkbox"/>	<input type="checkbox"/>
e. Very low risk taker	5	<input type="checkbox"/>	<input type="checkbox"/>
1.1.2 How familiar are you with investment markets?			
a. I am experienced with all asset sectors and understand the various factors which influence portfolio performance	1	<input type="checkbox"/>	<input type="checkbox"/>
b. I understand that markets fluctuate and that different asset sectors offer different income, growth and taxation characteristics	2	<input type="checkbox"/>	<input type="checkbox"/>
c. I have just enough experience to understand some aspects of investment markets	4	<input type="checkbox"/>	<input type="checkbox"/>
d. I have very little understanding of investment markets	5	<input type="checkbox"/>	<input type="checkbox"/>
1.1.3 How would you describe your experience with investment markets?			
a. I have had positive experiences with investing that outweigh the negative	1	<input type="checkbox"/>	<input type="checkbox"/>
b. I am not familiar with investments and am cautious	3	<input type="checkbox"/>	<input type="checkbox"/>
c. I have previously lost money as an investor and am very cautious about investing	5	<input type="checkbox"/>	<input type="checkbox"/>
1.1.4 What is the most aggressive investment you have made?			
a. Direct shares	1	<input type="checkbox"/>	<input type="checkbox"/>
b. Managed funds	2	<input type="checkbox"/>	<input type="checkbox"/>
c. Investment property	3	<input type="checkbox"/>	<input type="checkbox"/>
d. Own home	4	<input type="checkbox"/>	<input type="checkbox"/>
e. High interest savings account	5	<input type="checkbox"/>	<input type="checkbox"/>

1.2 Investment Timeframe

	Point(s)	Client 1	Client 2
1.2.1 Once investments have been placed, how long would it be before you would need to access your capital?			
a. Longer than 7 years	1	<input type="checkbox"/>	<input type="checkbox"/>
b. Between 5 and 7 years	2	<input type="checkbox"/>	<input type="checkbox"/>
c. Between 3 and 5 years	3	<input type="checkbox"/>	<input type="checkbox"/>
d. Between 2 and 3 years	4	<input type="checkbox"/>	<input type="checkbox"/>
e. Less than 2 years (parking)	5	<input type="checkbox"/>	<input type="checkbox"/>
1.2.2 How much money have you set aside, outside of your superannuation, to handle emergencies?			
a. Less than 1 month of living expenses	1	<input type="checkbox"/>	<input type="checkbox"/>
b. Between 3 and 6 months of living expenses	3	<input type="checkbox"/>	<input type="checkbox"/>
c. More than 6 months of living expenses	5	<input type="checkbox"/>	<input type="checkbox"/>