

Client Data Form – Financial Planning | Risk Profile

Based on your answers to the previous risk profiling questions, you have fallen within the following risk profile.

2.0 Risk Profile Results

Points (per client)	Points (combined)	Description	Client 1	Client 2
30 points or less	60 points or less	You are a High Growth Investor . You are prepared to take higher risks for potentially greater returns. Overall you have a greater need for capital growth than for income. You are well placed to recover from unforeseen market downturns either because you have time on your side or access to capital reserves.	<input type="checkbox"/>	<input type="checkbox"/>
31-40 points	61-80 points	You are a Growth Investor . Your investment portfolio should have a bias towards capital growth and you have little need for income. You are prepared to accept a higher degree of volatility and risk. Your primary concern is to accumulate assets over the medium to long term.	<input type="checkbox"/>	<input type="checkbox"/>
41-51 points	81-102 points	You are a Balanced Investor . Your investment portfolio should have a focus on capital growth with some need for income. Calculated risks will be acceptable to achieve better returns.	<input type="checkbox"/>	<input type="checkbox"/>
52-61 points	103-122 points	You are a Conservative Investor . Typically, you are an investor seeking to protect the wealth you have already accumulated. Your investment portfolio should be structured more towards income producing assets rather than assets offering capital growth. However some growth is expected to keep you ahead of inflation.	<input type="checkbox"/>	<input type="checkbox"/>
62 points or more	123 points or more	You are a Defensive Investor . Your investment portfolio should be biased towards security of capital. A regular income stream is a priority over capital growth. Investments typically have a higher liquidity.	<input type="checkbox"/>	<input type="checkbox"/>

3.0 Client Risk Profile Acknowledgement

	Client 1	Client 2
I agree with the category assigned above and understand that this profile will be considered in the advice process Please refer to section 6.0 for sign-off	<input type="checkbox"/>	<input type="checkbox"/>
I disagree with the category assigned in section 2.0 Please continue to section 5.0	<input type="checkbox"/>	<input type="checkbox"/>

Notes