

**What is Your Attitude Towards Risk?**

The following questionnaire will help you evaluate your attitude towards risk and help you determine what type of investor you are. Your score will help you to determine an appropriate "risk profile" for your plan investments.

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Your Answers
<b>1. Risk Tolerance.</b> I am willing to accept above-average investment risk that may result in occasional years of negative investment returns.	5	4	3	2	1	<input type="text"/>
<b>2. Expected Return.</b> Based on historical returns from different types of investments, my desired level of investment return is above average.	5	4	3	2	1	<input type="text"/>
<b>3. Liquidity.</b> I have an adequate amount of assets available to meet major short-term expenses, and would not need to convert my investment holdings into cash.	5	4	3	2	1	<input type="text"/>
<b>4. Investment Experience.</b> I have prior investing experience with stocks, bonds, and international investments, and am aware of the risks associated with each.	5	4	3	2	1	<input type="text"/>
<b>5. Holding Period.</b> I am willing to maintain investment holdings for 10 years or more.	5	4	3	2	1	<input type="text"/>
<b>6. Income Source.</b> My source(s) of income is reliable and growing steadily at or above the pace of inflation.	5	4	3	2	1	<input type="text"/>
<b>7. Ease of Management.</b> I want to play an active role in managing my investments.	5	4	3	2	1	<input type="text"/>
<b>8. Dependents.</b> I have no more than one dependent who relies on my income and investment holdings for financial support.	5	4	3	2	1	<input type="text"/>
<b>9. Insurance Coverage.</b> I have adequate insurance coverage to meet the requirements of those who depend on me financially.	5	4	3	2	1	<input type="text"/>
<b>10. Debt/Credit.</b> I maintain a low amount of debt and have a good/excellent credit rating.	5	4	3	2	1	<input type="text"/>

Your Risk Profile				
Score: 10-15	Score: 16-24	Score: 25-34	Score: 35-44	Score: 45-50
Conservative	Moderately Conservative	Moderate	Moderately Aggressive	Aggressive

**TOTAL:**

**BASED ON MY SCORE, MY RISK PROFILE IS:**