

Risk Tolerance Questionnaire



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Income & Expense

1. What is your approximate yearly household income? Include salary, bonuses, commission, pension plan distributions (excluding one-time lump distributions), Social Security, interest and dividends earned, and other income.
 - Under \$50,000
 - \$50,000 to \$100,000
 - \$100,000 to \$200,000
 - Over \$200,000
2. How much do you expect your household income to change over the next three years?
 - Within 5% up or down
 - Decrease 5% to 20%
 - Decrease greater than 20%
 - Increase 5% to 20%
 - Increase greater than 20%
3. How much do you expect your household expenses to change over the next three years?
 - Within 5% up or down
 - Decrease 5% to 20%
 - Decrease greater than 20%
 - Increase 5% to 20%
 - Increase greater than 20%

Net Worth

4. What is the total current market value of all of your assets?
5. What is the total value of all of your outstanding liabilities?

6. If you needed \$10,000 due to an unexpected financial obligation, would you have to redeem from this account?

Yes

No

7. Is tax sensitive investing a primary goal?

Yes

No

Investment Horizon

8. What is your primary investment goal?

Build wealth

Finance retirement

Generate income

Other (please describe below)

9. What is the expected time horizon of this account?

3 years

5 years

10 years

15 years

20 years

Greater than 20 years

10. What is the federal income tax rate on earnings from all sources?

0% / Tax deferred (IRA Keogh, etc.)

10%

12%

22%

24%

32%

35+%

11. How much money are you currently saving on an annual basis?

Volatility

12. The portfolio we recommend for you may fluctuate over the short term. Hypothetically, if you invested \$100,000 and it was performing in line with world financial markets and lost value during a year, at what point would you sell?

I would not sell.

\$90K

\$80K

Less than \$80K

13. I am prepared to sacrifice some safety for higher returns.

Agree

Somewhat agree

Somewhat disagree

Disagree

14. I am willing to accept fluctuating returns in order to achieve my goal.

Agree

Somewhat agree

Somewhat disagree

Disagree

15. I am willing to accept some risk in an effort to stay ahead of inflation.

Agree

Somewhat agree

Somewhat disagree

Disagree

16. From time to time, I can tolerate negative returns.

Agree

Somewhat agree

Somewhat disagree

Disagree

17. I am willing to accept higher volatility to achieve above average returns.

Agree

Somewhat agree

Somewhat disagree

Disagree

Name:

Date:

Steps to return completed form:

1. Save the completed form to your computer by using the “save as” function. This step will ensure that your answers are retained on the form.
2. Please return the completed form by uploading it to your MAP Vault or faxing it to us at (630) 445-0042. To protect your information, please **do NOT return this form via email.**

If you have any questions, please don't hesitate to contact us. We look forward to working with you!



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