

What percentage of your total investments will you invest in this account?:

- More than 75% of my total investments
- Between 25% and 75% of my total investments
- Less than 25% of my total investments

What is your age?:

- < 25
- 25 - 50
- 50 - 65
- > 65

What is your current employment status?:

- Retired.
- Unemployed with diminished future job prospects
- Unemployed and actively looking for a job
- Unemployed and independently wealthy
- Employed full-time
- Employed part-time
- Self-employed
- Homemaker

Financial situation and needs:

- Ample saving, stable financial situation, can afford to take large risks
- Modest saving, stable financial situation, can afford to take moderate risks
- Minimal savings, or unstable financial situation

How long do you have to meet your financial goal for this account?:

- I have less than 1 year to meet my financial goal
- I have up to 5 years to meet my financial goals
- I have greater than 5 years to meet my goals

Do you want more or less risk when compared to passively investing in broad equity market index like**S&P?:**

- Capital preservation
- Cautious growth
- Moderate growth similar to that of S&P 500
- Growth plus

- Aggressive growth
- Speculative growth

How would characterize your openness to taking on investment risk compared to your colleagues, friends or family?:

- A lot more risk-averse
- More risk-averse
- About the same
- More willing to take risk
- A lot more willing to take risk

How much financial risk are you willing to take at this point in your life?:

- None
- Very little
- Average
- Some
- Large
- Very large

What level of value drop in your current investments would lead you to make drastic decisions to liquidate your losing investments or all your investments?:

- Any value drop
- 5-10% value drop
- 20-30% value drop
- 30-40% value drop
- 40-50% value drop
- More than 50% value drop

Submit