

INVESTOR PROFILE QUIZ

What Type of Investor are you?

1. What is your age?

0-25 years (6) 26-40 years (4) 41-54 years (3) 55 – 65 years (2) 66 + years (0)

SCORE _____

2. How many years before you start withdrawing from your pension plan?

0-2 years (0) 3-5 years (2) 6-10 years (3) 11-15 years (4) 16 + years (6)

SCORE _____

3. I associate the word "RISK" with the idea of opportunity.

Strongly disagree (1) Disagree (2) No opinion (3) Agree (4) Strongly agree (6)

SCORE _____

4. If an investment loses money over the course of a year, can you easily resist the temptation to sell it?

Strongly disagree (1) Disagree (2) No opinion (3) Agree (4) Strongly agree (6)

SCORE _____

5. My investment performance goal for long term investing is?

0-2% (1) 3-5% (2) 6-7% (3) 8-10% (4) 11 + % (6)

SCORE _____

6. Which statement best describes your current investment strategy?

I invest in CD's and / or keep my money in a savings account. (1)

I invest in mutual funds. (2)

I invest in mutual funds, stocks and bonds. (3)

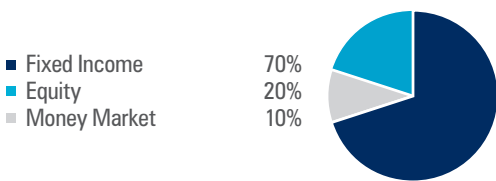
I invest in the stock market directly. (5)

SCORE _____

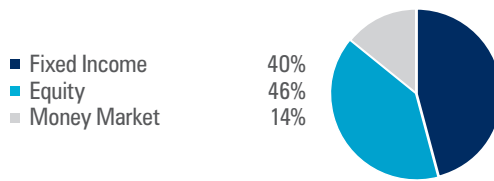
TOTAL SCORE _____

Investor Profile - add up all six scores for your result

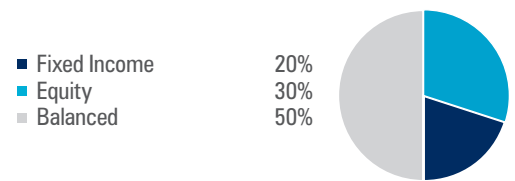
CONSERVATIVE 4-8 score



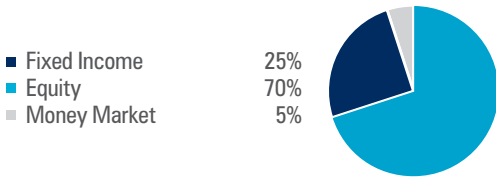
MODERATELY CONSERVATIVE 9-11 score



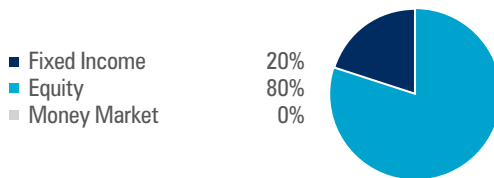
OPTIMAL 12-17 score



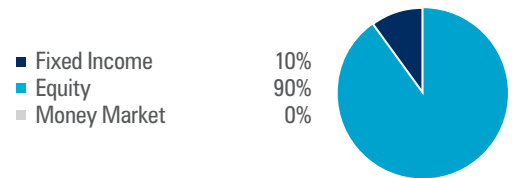
MODERATE 18-23 score



MODERATELY AGGRESSIVE 24-29 score



AGGRESSIVE 30-35 score



DISCLAIMER: The risk model allocations are hypothetical in nature and are for illustrative purposes only. The suggested allocations based upon your Investor Profile quiz score do not represent actual securities or performance information. Should there be any changes in your financial circumstances, we do recommend a review on your investment strategy.