Your name:

Instructions:

Please note: you may prefer to complete this online at: www.flowersmcewan.co.uk/risk.html

- I. For each of the following questions tick the yellow box that best describes your response
- 2. Please answer all the questions
- 3. Please only give 1 response per question
- 4. If you have any comments to make which shed light on your attitude to risk then please add them
- to the box at the foot of the questionnaire
- 5. Married couples/partners please complete one questionnaire each

I How experienced are you as an investor?

	Quite	Moderately		
Very inexperienced	inexperienced	experienced	Quite Experienced	Very experienced

2 How important is it to you that your capital won't go down in value in the short-term (1-5 years)?

		Relatively			
Very important	Important	In between	unimportant	Unimportant	

3 What is your investment time-horizon (how long can you afford to leave your investments before you might need access to the bulk of your capital - even though income may be required sooner)?

Under 5 years	5+ years	10+ years	15+ years	20+ years

4 Higher returns are more important to me than capital security?

		They are equally		
l strongly disagree	l disagree	important	l agree	l strongly agree

5 When investing what are you chiefly concerned about?

Always the	Usually the	Both the potential	Usually the	Always the
potential losses	potential losses	gains and losses	potential gains	potential gains

6 How far could you tolerate your investments falling in value?

No fall	10% fall	20% fall	33% fall	50% fall



7 Assuming that you have already set-aside sufficient cash reserves for your short-term needs, which combination do you think would most suit your remaining long-term investments?

(Low = Cash; Medium = Government and Corporate Bonds; High = Shares)

	90% Low-Medium:	70% Low-Medium:	50% Low-Medium:	30% Low-Medium:	10% Low-Medium:
100% Low (Cash)	10% High	30% High	50% High	70% High	90% High

8 Do you think of investment risk as:

	Danger or			
Danger	uncertainty	Uncertainty	Opportunity	Thrill

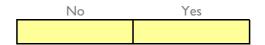
9 How do you adapt to financial disappointments?

		Sometimes		
		uneasily, sometimes		
Very uneasily	Somewhat uneasily	easily	Somewhat easily	Very easily

10 What degree of risk would you like to take with your investments?

Very small	Small	Medium	Large	Very large

II Would you prefer your investments to be ethically-screened where possible?



12 Any other comments you wish to make which may shed light on your attitude to risk?



Your signature:

Date Completed

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