

Your name:

**Instructions:**

Please note: you may prefer to complete this online at: [www.flowersmcewan.co.uk/risk.html](http://www.flowersmcewan.co.uk/risk.html)

1. 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

1 How experienced are you as an investor?

Very inexperienced	Quite inexperienced	Moderately 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)?

Very important	Important	In between	Relatively 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?

I strongly disagree	I disagree	They are equally important	I agree	I strongly agree

5 When investing what are you chiefly concerned about?

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

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

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

# INVESTMENT RISK QUESTIONNAIRE



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)

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

8 Do you think of investment risk as:

Danger	Danger or uncertainty	Uncertainty	Opportunity	Thrill

9 How do you adapt to financial disappointments?

Very uneasily	Somewhat uneasily	Sometimes uneasily, sometimes 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

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

No	Yes

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

Your signature:

Date Completed