

## RISK ATTITUDE PROFILING QUESTIONNAIRE

This document should be used to record your answers to the Risk Attitude Profiling Questionnaire. It allows your financial adviser to complete the online risk questionnaire at a later date.

### BASIC INFORMATION

#### Title

Mr  Mrs  Miss  Ms    
Other (please specify)

Forename

Surname

#### Date of Birth

#### Chosen Retirement Age

(dd/mm/yyyy)

#### Signature

#### Date

### QUESTIONS

There are twelve statements. Please score each statement on how closely it resembles your current situation, attitudes and feelings.

**01 People who know me would describe me as a cautious person.**

Strongly agree  Agree  No strong opinion  
 Disagree  Strongly disagree

**02 I feel comfortable about investing in the stockmarket.**

Strongly agree  Agree  No strong opinion  
 Disagree  Strongly disagree

**03 I generally look for safer investments, even if that means lower returns.**

Strongly agree  Agree  No strong opinion  
 Disagree  Strongly disagree

**04 Usually it takes me a long time to make up my mind on investment matters.**

Strongly agree  Agree  No strong opinion  
 Disagree  Strongly disagree

**05 I associate the word "risk" with the idea of "opportunity".**

Strongly agree  Agree  No strong opinion  
 Disagree  Strongly disagree

**06 I generally prefer bank deposits to riskier investments.**

Strongly agree  Agree  No strong opinion  
 Disagree  Strongly disagree

**07 I find investment matters easy to understand.**

Strongly agree  Agree  No strong opinion  
 Disagree  Strongly disagree

**08 I'm willing to take substantial investment risk to earn substantial returns.**

Strongly agree  Agree  No strong opinion  
 Disagree  Strongly disagree

**09 I've little experience of investing in stocks and shares.**

Strongly agree  Agree  No strong opinion  
 Disagree  Strongly disagree

**10 I tend to be anxious about the investment decisions I've made.**

Strongly agree  Agree  No strong opinion  
 Disagree  Strongly disagree

**11 I'd rather take my chances with higher risk investments than increase the amount I'm saving.**

- Strongly agree    Agree    No strong opinion  
 Disagree    Strongly disagree

**12 I'm concerned by the volatility of stockmarket investments.**

- Strongly agree    Agree    No strong opinion  
 Disagree    Strongly disagree

## FURTHER INFORMATION

Further information on the underlying methodology used in the risk questionnaire is available in the leaflet **A guide to our Risk Attitude Profiling Questionnaire**. Details are also available at [royallondon.com/pensioninvestments](http://royallondon.com/pensioninvestments)

## COPYRIGHT

The risk attitude profiling questions are © A2Risk Limited 2014. Unauthorised copying, in any form, is prohibited.



**Royal London**

1 Thistle Street, Edinburgh EH2 1DG

**royallondon.com**

All literature about products that carry the Royal London brand is available in large print format on request to the Marketing Department at Royal London, St Andrew House, 1 Thistle Street, Edinburgh EH2 1DG.

All of our printed products are produced on stock which is from FSC® certified forests.

The Royal London Mutual Insurance Society Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. The firm is on the Financial Services Register, registration number 117672. It provides life assurance and pensions. Registered in England and Wales number 99064. Registered office: 55 Gracechurch Street, London, EC3V 0RL. Royal London Marketing Limited is authorised and regulated by the Financial Conduct Authority and introduces Royal London's customers to other insurance companies. The firm is on the Financial Services Register, registration number 302391. Registered in England and Wales number 4414137. Registered office: 55 Gracechurch Street, London, EC3V 0RL. Royal London Corporate Pension Services Limited is authorised and regulated by the Financial Conduct Authority and provides pension services. The firm is on the Financial Services Register, registration number 460304. Registered in England and Wales number 5817049. Registered office: 55 Gracechurch Street, London, EC3V 0RL.