

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

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Royal London
1 Thistle Street, Edinburgh EH2 1DG
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