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 (dd/mm/yyyy) Chosen Retirement Age
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.
▼ ▲ □ □ □ □ No strong opinion □ □ □ □ □ □
Strongly agree Agree Strongly disagree
Disagree

02 I feel comfortable about investing in the stockmarket.
▼ ▲ □ □ □ □ No strong opinion □ □ □ □ □ □
Strongly agree Agree Strongly disagree
Disagree

03 I generally look for safer investments, even if that means lower returns.
▼ ▲ □ □ □ □ No strong opinion □ □ □ □ □ □
Strongly agree Agree Strongly disagree
Disagree

04 Usually it takes me a long time to make up my mind on investment matters.
▼ ▲ □ □ □ □ No strong opinion □ □ □ □ □ □
Strongly agree Agree Strongly disagree
Disagree

05 I associate the word “risk” with the idea of “opportunity”.
▼ ▲ □ □ □ □ No strong opinion □ □ □ □ □ □
Strongly agree Agree Strongly disagree
Disagree

06 I generally prefer bank deposits to riskier investments.
▼ ▲ □ □ □ □ No strong opinion □ □ □ □ □ □
Strongly agree Agree Strongly disagree
Disagree

07 I find investment matters easy to understand.
▼ ▲ □ □ □ □ No strong opinion □ □ □ □ □ □
Strongly agree Agree Strongly disagree
Disagree

08 I’m willing to take substantial investment risk to earn substantial returns.
▼ ▲ □ □ □ □ No strong opinion □ □ □ □ □ □
Strongly agree Agree Strongly disagree
Disagree

09 I’ve little experience of investing in stocks and shares.
▼ ▲ □ □ □ □ No strong opinion □ □ □ □ □ □
Strongly agree Agree Strongly disagree
Disagree

10 I tend to be anxious about the investment decisions I’ve made.
▼ ▲ □ □ □ □ No strong opinion □ □ □ □ □ □
Strongly agree Agree Strongly disagree
Disagree
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

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

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