



## INVESTMENT OBJECTIVES AND RISK TOLERANCE QUESTIONNAIRE SCORING FORM

In this section, we rely on the answers that were provided to suggest an investment structure that fits your client's particular needs. Each answer to questions 1 through 10 has some number of points associated with it [shown in brackets]. Simply enter them into the template below to arrive at the total score.

Questions	Answers	Score
#1.	a. [8]    b. [20]    c. [35]    d. [45]	_____
#2.	a. [8]    b. [20]    c. [35]    d. [45]	_____
#3.	a. [8]    b. [20]    c. [35]    d. [45]	_____
#4.	a. [8]    b. [20]    c. [35]    d. [45]	_____
#5.	a. [0]    b. [-2.5]    c. [-5]    d. [-10]	_____
#6.	a. [0]    b. [-10]    c. [-5]    d. [-2.5]	_____
#7.	a. [10]    b. [20]    c. [30]    d. [40]    e. [50]    f. [60]	_____
#8.	a. [10]    b. [20]    c. [30]    d. [40]    e. [50]    f. [60]	_____
#9.	a. [-10]    b. [-5]    c. [-2.5]    d. [0]	_____
#10.	a. [-10]    b. [-5]    c. [0]    d. [5]	_____
<b>Total</b>		

Use the computed score to find your suggested asset mix in the table below.

PROFILE	SCORE
Model Portfolio #1	Less Than 113 Points
Model Portfolio #2	Between 113 & 142 Points
Model Portfolio #3	Between 143 & 162 Points
Model Portfolio #4	Between 163 & 182 Points
Model Portfolio #5	Between 183 & 212 Points
Model Portfolio #6	More Than 213 Points