**ATTITUDE TO RISK
QUESTIONNAIRE**

**Client Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

This questionnaire will help your adviser and you to determine the type of investment suitable for you.

Please tick the most appropriate rsponse to the 12 statements below ensuring you only tick one response per statement.

|  | Strongly Agree | Agree | Neutral | Disagree | Strongly Disagree |
| --- | --- | --- | --- | --- | --- |
| People who know me would describe me as a cautious person. |  |  |  |  |  |
| I feel comfortable about investing in the stock market. |  |  |  |  |  |
| I generally look for safer investments, even if that means lower returns.  |  |  |  |  |  |
| Usually it takes me a long time to make up my mind on investment decisions.  |  |  |  |  |  |
| I associate the word “risk” with the idea of “opportunity”. |  |  |  |  |  |
| I generally prefer bank deposits to riskier investments.  |  |  |  |  |  |
| I find investment matters easy to understand.  |  |  |  |  |  |
| I'm willing to take substantial investment risk to earn substantial returns.  |  |  |  |  |  |
| I’ve little experience of investing in stocks, shares, or investment funds |  |  |  |  |  |
| I tend to be anxious about the investment decisions I've made.  |  |  |  |  |  |
| I’d rather take my chances with higher risk investments than have to save more |  |  |  |  |  |
| I’m not comfortable with the ups and downs of stock market investments  |  |  |  |  |  |

**ATTITUDE TO RISK QUESTIONNAIRE**

| Risk Category | Low score | Upper score | Consistency Check? |
| --- | --- | --- | --- |
| Risk Averse | 0 | 11 | X |
| Conservative | 12 | 14 | X |
| Balanced  | 15 | 19 | √ |
| Moderate | 20 | 26 | √ |
| Dynamic | 27 | 34 | √ |
| Adventurous | 35 | 48 | √ |

|  | Strongly Agree | Agree | Neutral | Disagree | Strongly Disagree | Score |
| --- | --- | --- | --- | --- | --- | --- |
| People who know me would describe me as a cautious person. | 0 | 1 | 2 | 3 | 4 |  |
| I feel comfortable about investing in the stock market. | 4 | 3 | 2 | 1 | 0 |  |
| I generally look for safer investments, even if that means lower returns.  | 0 | 1 | 2 | 3 | 4 |  |
| Usually it takes me a long time to make up my mind on investment decisions.  | 0 | 1 | 2 | 3 | 4 |  |
| I associate the word “risk” with the idea of “opportunity”. | 4 | 3 | 2 | 1 | 0 |  |
| I generally prefer bank deposits to riskier investments.  | 0 | 1 | 2 | 3 | 4 |  |
| I find investment matters easy to understand.  | 4 | 3 | 2 | 1 | 0 |  |
| I'm willing to take substantial investment risk to earn substantial returns.  | 4 | 3 | 2 | 1 | 0 |  |
| I’ve little experience of investing in stocks, shares, or investment funds | 0 | 1 | 2 | 3 | 4 |  |
| I tend to be anxious about the investment decisions I've made.  | 0 | 1 | 2 | 3 | 4 |  |
| I’d rather take my chances with higher risk investments than have to save more | 4 | 3 | 2 | 1 | 0 |  |
| I’m not comfortable with the ups and downs of stock market investments  | 0 | 1 | 2 | 3 | 4 |  |
| Total Score |  |