

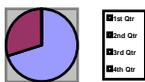
## Investment Profile:

1. What do you want from your investments?
  - a) Keep pace with and possible outperform inflation.
  - b) Produce income.
  - c) Produce a combination: income and appreciation.
  - d) Achieve growth with an emphasis on capital and not on income.
  
2. When do you anticipate needing the funds?
  - a) 3-6 years
  - b) 7-10 years
  - c) 11-20 years
  - d) 21-29 years
  - e) 30+ years
  
3. How do you expect your savings and investments contributions to vary over the next 5-10 years?
  - a) Decrease substantially.
  - b) Decrease slightly.
  - c) Remain approximately the same.
  - d) Increase slightly.
  - e) Increase substantially.
  
4. Which statement describes your comfort level with regards to investments?
  - a) You are uncomfortable with potential short term losses.
  - b) You understand and can tolerate minor losses.
  - c) You can tolerate negative performance over 6 months to 1 year understanding this is often the trade-off for possibility of increasing investment returns.
  - d) You can tolerate negative performance over 1 year or more understanding this is often the trade-off for possibility of earning higher returns.
  
5. What age group are you in?
  - a) 20-29 years
  - b) 30-39 years
  - c) 40-49 years
  - d) 50-59 years
  - e) 60+ years

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1)A=2	B=4	C=6	D=8	
2)A=2	B=4	C=6	D=8	E=10
3)A=2	B=4	C=6	D=8	E=10
4)A=2	B=4	C=6	D=8	
5)A=10	B=8	C=6	D=4	E=2

<u>Points</u>	<u>Type</u>	<u>Allocate</u>
10-20 points	Income/Conservative	70/30 50/50
21-29 points	Conservative/Growth	40/60 50/50
30 -35 points	Growth Funds	60/40 70/30
36 - 46 points	Aggressive/Growth	70/30 80/20



**Income/Conservative**

**Conservative/Growth**

**Growth**

**Aggressive/Growth**

**Aggressive**