



INVESTMENT QUESTIONNAIRE

Your thoughts on investment volatility

Questions		Answers										
1	I would be okay with falls of up to X% in any month of the invested (as opposed to cash) element of my plan.	3	5	7	10	15	20					
2	On a scale of 0-10 I have this much investment experience.	0	1	2	3	4	5	6	7	8	9	10
		Strongly agree	Agree	Disagree	Strongly disagree							
3	I feel comfortable about investing in the stock market.											
4	I prefer investments with a known return to those with a variable return.											
5	I'm likely to take more risk with my money than my family or friends.											
6	I'm happy to invest in more volatile assets to improve my chances of growth greater than inflation over the longer term.											
7	Losing money over the long term on an investment would worry me.											
8	If my investment fell below its original level, then my first thought would be to sell my investments.											
9	I am more worried about the thought of losing money than the potential for higher returns.											
10	I would prefer to know that my capital is secure in the long term, even if this means that I miss out on growth greater than inflation.											



ATTITUDES QUESTIONNAIRE

Your capacity for loss

When do you intend to use this invested money (as opposed to the cash we are setting aside)?	Long term (7+ years)	
	Medium term (3 – 7 years)	
	Short term (0 – 3 years)	
How much of this investment could you stand to lose without it having a significant impact on your future standard of living (bearing in mind we will set aside three years' expenses in cash)?	Limited losses (e.g., 5% top to bottom)	
	Small / medium losses could be tolerated (e.g., 5-15% top to bottom)	
	Large losses would have a low impact on future lifestyle (e.g., 15%+ top to bottom)	
If you needed sudden access to a lump sum, how likely is it that you would need to encash this investment?	I have other savings and investments which I can use for most needs	
	I may need this investment if I needed access to a significant amount of money quickly	
	I would almost certainly need access to this investment	

NAME	
SIGNED	
DATE	