



TOWN CLOSE
Financial Planning

Investment questionnaire

future proofing your finances



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

How likely is it that you will lose your money?	<input type="radio"/> None at all	
	<input type="radio"/> Some (3-7%)	
	<input type="radio"/> Most	
How likely is it that you will lose your money if you are ill?	<input type="radio"/> None at all	
	<input type="radio"/> Some (3-7%)	
	<input type="radio"/> Most	
How likely is it that you will lose your money if you are ill and have a low income?	<input type="radio"/> None at all	
	<input type="radio"/> Some (3-7%)	
	<input type="radio"/> Most	
How likely is it that you will lose your money if you are ill and have a low income and you are dependent on your savings?	<input type="radio"/> None at all	
	<input type="radio"/> Some (3-7%)	
	<input type="radio"/> Most	

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DATE	
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