

What type of investor am I?

Your investor profile will depend on the type of investor you are, your investment time frame and the level of risk you are prepared to take. This Risk Profile Quiz can help you work out your investor profile and indicate the Fund(s) suitable to you.

Remember, this is a guide only and may not accurately reflect your particular circumstances. Before making your choice you should refer to investment statement that you are investing into and can talk with us as your financial adviser to help you plan for your future.

For each of the questions, read the statements and **circle** the number that most applies to you. If there is more than one person completing this quiz, please ask them to use the additional columns provided.

Risk Profile Quiz Questions

Date: / /

	Name:	Name:	Name:	Name:
My current age is:				
Age 55 and over	1	1	1	1
Age 45 to 54	3	3	3	3
Age 35 to 44	5	5	5	5
Under age 35	7	7	7	7
Your main investment goal from now until retirement is:				
- to earn steady income	1	1	1	1
- to mainly earn income and grow my money a little	3	3	3	3
- to mainly grow my money but with some caution	5	5	5	5
- to grow my money long term regardless of short term volatility	7	7	7	7
If you owned an investment that fell by 20% over a short period, you would:				
- move all that was left to a fund that held only cash	1	1	1	1
- move some of what was left into a cash fund	3	3	3	3
- hold the investment, I feel it should improve over time	5	5	5	5
- contribute more to the fund that has suffered the loss	7	7	7	7
"Investing in managed funds is the same as spinning the roulette wheel because the odds are stacked against me"				
- I agree strongly	1	1	1	1
- I agree	3	3	3	3
- I neither agree nor disagree	5	5	5	5
- I disagree	7	7	7	7
- I disagree strongly	10	10	10	10
What mix of investments makes you feel most comfortable?				
- bank deposits only	1	1	1	1
- bank deposits and property	3	3	3	3
- bank deposits, property and shares	5	5	5	5
- mainly shares	7	7	7	7
Total Score:				

Add together all the scores you have circled and match the total of each person's score (as applicable) to the suggested investments below.

Your Total Score	Investor Type
9 or less	Defensive Investor
10 to 14	Conservative Investor
15 to 20	Balanced Investor
21 to 26	Balanced Growth Investor
27 to 32	Growth Investor
33 to 38	Aggressive Growth Investor

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