

understanding your RISK TOLERANCE

RISK REQUIRED

the appropriate level of risk your financial goals demand

AGGRESSIVE

can take huge risks and fluctuations and therefore prefer dynamic asset classes like equities

RISK TOLERANCE

the amount of risk you are willing to take

MODERATE

can take on some risk and accommodate a certain percentage of loss and thus, they balance between risky and safe investment choices

RISK CAPACITY

the maximum level of risk you can afford to take

CONSERVATIVE

dislikes taking risk and prioritizes avoiding losses over earning gains, which limits them to asset classes where their capital is secured

questions to consider

- What is your age range?
- When do you expect to start drawing income?
- What is your goal for this investment?
- If the market were to perform usually, what would you expect from this investment over time?
- If the market were to perform poorly, what would you expect from this investment over time?
- What are your feelings and attitudes about the next three months' performance of this investment?
- What are your feelings and attitudes about the next three years' performance of this investment?

