

## Section 1 — Investment Goals

### 1. What is your primary investment goal?

- Preserve wealth
- Generate income
- Balanced income & growth
- Growth
- Aggressive growth

### 2. What are you primarily investing for?

- Retirement
- Education
- Major purchase
- General wealth building
- Other

## Section 2 — Time Horizon

### 3. When do you expect to begin withdrawing money?

- 0–3 years
- 3–5 years
- 5–10 years
- 10+ years

### 4. How long do you plan to keep the money invested?

- Less than 3 years
- 3–5 years
- 5–10 years
- More than 10 years

## Section 3 — Risk Tolerance

### 5. How would you react if your portfolio dropped 20%?

- Sell immediately
- Sell some investments
- Do nothing
- Invest more while prices are low

### 6. Which statement best describes you?

- I prefer safety even if returns are low
- I want moderate growth with moderate risk
- I want higher returns and accept volatility

## Investment Profile Analysis Questionnaire



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After you fill out the form, I can send you a customized portfolio of information, including some insights behind my recommendations.

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