

1. When making a long-term investment, I plan to hold the investment for:

- a. 1 to 2 years (1 point)
- b. 3 to 4 years (2 points)
- c. 5 to 6 years (3 points)
- d. 7 to 8 years (4 points)
- e. 9 to 10+ years (5 points)

Points _____

2. If you owned an investment that fell 20% over a short period of time, what would you do?

- a. Sell all of the investment (1 point)
- b. Sell a portion of the investment (2 points)
- c. Sell nothing (3 points)
- d. Buy more of the investment (4 points)

Points _____

3. Generally, I prefer an investment with little or no fluctuation in value, and I am willing to accept the lower return associated with these investments.

- a. I strongly agree (1 point)
- b. I agree (2 points)
- c. I disagree (3 points)
- d. I strongly disagree (4 points)

Points _____

4. When it comes to investing in stocks and bonds, I would describe myself as a:

- a. Very inexperienced investor (1 point)
- b. Somewhat inexperienced investor (2 points)
- c. Somewhat experienced investor (3 points)
- d. Experienced investor (4 points)
- e. Very experienced investor (5 points)

Points _____

5. How optimistic are you about the long-term prospects of the economy?

- a. Pessimistic (1 point)
- b. Unsure (2 points)
- c. Somewhat optimistic (3 points)
- d. Optimistic (4 points)

Points _____

6. What do you hope your portfolio value will be 10 years from now?

- a. A little higher than it is today (1 point)
- b. Moderately higher than it is today (2 points)
- c. Substantially higher than it is today (3 points)

Points _____

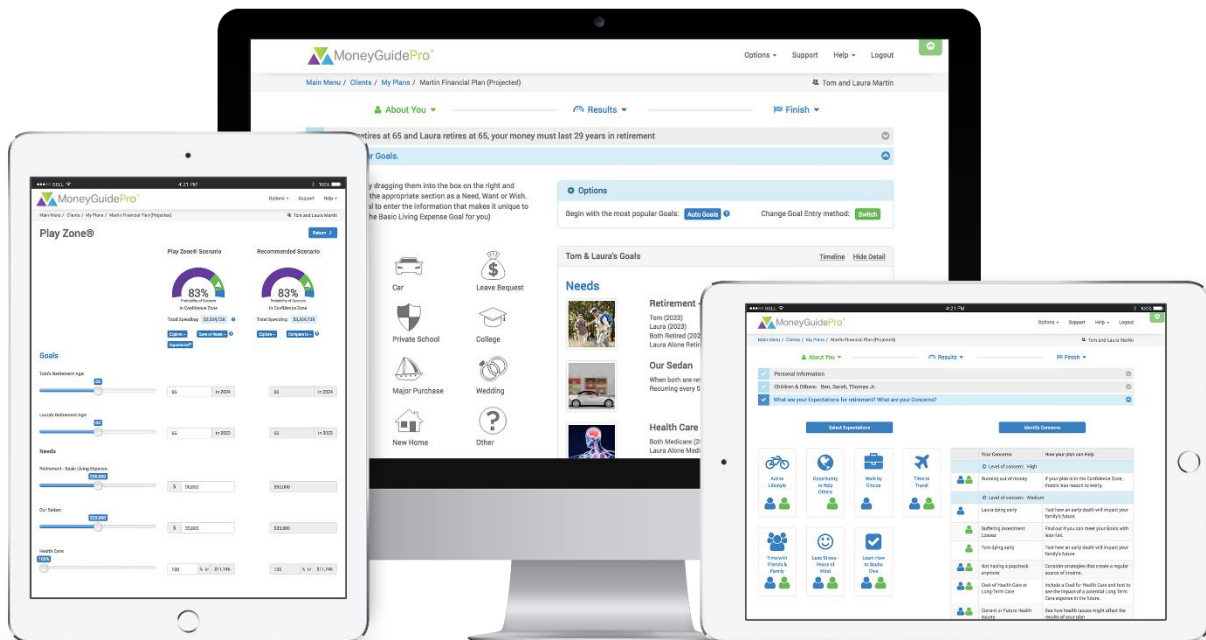
Investment Risk Tolerance Quiz

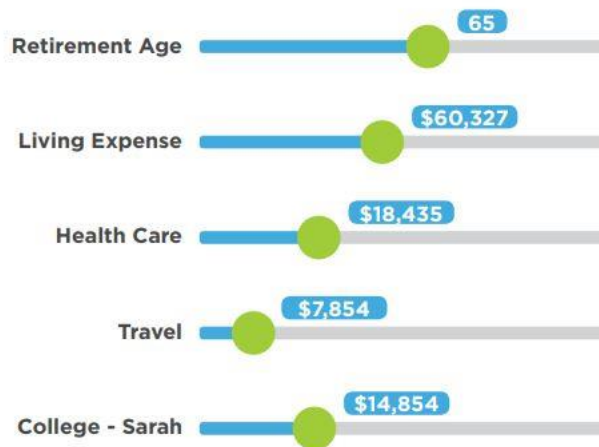
- A B C D
1. In general, how would your best friend describe you as a risk taker?
- A real gambler
 - Willing to take risks after completing adequate research
 - Cautious
 - A real risk avoider
- A B C D
2. You are on a TV game show and can choose one of the following. Which would you take?
- \$1,000 in cash
 - A 50% chance at winning \$5,000
 - A 25% chance at winning \$10,000
 - A 5% chance at winning \$100,000
- A B C D
3. You have just finished saving for a “once-in-a-lifetime” vacation. Three weeks before you plan to leave, you lose your job. You would:
- Cancel the vacation
 - Take a much more modest vacation
 - Go as scheduled, reasoning that you need the time to prepare for a job search
 - Extend your vacation, because this might be your last chance to go first-class
- A B C
4. If you unexpectedly received \$20,000 to invest, what would you do?
- Deposit it in a bank account, money market account, or an insured CD
 - Invest it in safe high quality bonds or bond mutual funds
 - Invest it in stocks or stock mutual funds
- A B C
5. In terms of experience, how comfortable are you investing in stocks or stock mutual funds?
- Not at all comfortable
 - Somewhat comfortable
 - Very comfortable
- A B C D
6. When you think of the word “risk” which of the following words comes to mind first?
- Loss
 - Uncertainty
 - Opportunity
 - Thrill

Thank you for getting this far in the course and as a gift we would like to offer you a 30% discount off a Retirement Readiness Report card from our online planning store. We will do all the retirement planning for you, while helping you figure out your risk tolerance.

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What does it mean for you?

Financial planning is about more than assets, investments and net worth. It's about what you want to do with your money and why. It's about identifying your concerns, expectations and goals - it's about how you feel and what you want.

MoneyGuidePro® helps address common fears and concerns such as health care costs, outliving your money and the best time to file for Social Security benefits. The confidence meter helps you gauge how likely you are to reach your goals and whether you are on track instead of focusing on headlines.

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