

Attitude to Risk – Questionnaire

Client Name:	
Investment Type:	<i>Pension, Stocks & Shares ISA, OEIC, UTGoal</i>
Goal:	<i>Regular savings, school fees, house deposit</i>

	Strongly Agree	Agree	No Strong Option	Disagree	Strongly Disagree
I find investment and other financial matters easy to understand.					
Usually it takes me a long time to make up my mind on financial matters.					
I have little experience of investing in stocks and shares.					
I associate the word 'risk' with the idea of 'thrill'.					
When it comes to investing, I'd rather be safe than sorry.					
I'd rather take my chances with high risk / high return investments than have to increase the amount I am saving.					
I am willing to take substantial financial risk to earn substantial returns.					
I am not willing to take any financial risk.					
I generally look for the safest type of investment, even if that means lower returns.					
I feel comfortable about investing in the stock market.					
I prefer the safety of keeping my money in the bank.					
People who know me would describe me as a bit of a gambler.					
How long would you like to invest for? (years)	1-5	5-10	10-15	15+	

Client Signature:

Date: