

# Establishing Client's Risk Profile

## Initial Questionnaire

Developed by Intrinsic Financial Planning Ltd

<b>Adviser Name</b>	
<b>Client Full Name</b>	
<b>House Name/Number</b>	
<b>Street</b>	
<b>Town/City</b>	
<b>County</b>	
<b>Postcode</b>	
<b>Date of Completion</b>	

Question	Your Response
People who know me would describe me as a cautious person.	Strongly Agree, Agree, No Strong Opinion, Disagree, Strongly Disagree
I feel comfortable about investing in the stockmarket.	Strongly Agree, Agree, No Strong Opinion, Disagree, Strongly Disagree
I generally look for safer investments, even if that means lower returns.	Strongly Agree, Agree, No Strong Opinion, Disagree, Strongly Disagree
Usually it takes me a long time to make up my mind on investment decisions.	Strongly Agree, Agree, No Strong Opinion, Disagree, Strongly Disagree
I associate the word "risk" with the idea of "opportunity".	Strongly Agree, Agree, No Strong Opinion, Disagree, Strongly Disagree
I generally prefer bank deposits to riskier investments.	Strongly Agree, Agree, No Strong Opinion, Disagree, Strongly Disagree
I find investment matters easy to understand.	Strongly Agree, Agree, No Strong Opinion, Disagree, Strongly Disagree
I'm willing to take substantial investment risk to earn substantial returns.	Strongly Agree, Agree, No Strong Opinion, Disagree, Strongly Disagree
I've little experience of investing in stocks and shares.	Strongly Agree, Agree, No Strong Opinion, Disagree, Strongly Disagree
I tend to be anxious about the investment decisions I've made.	Strongly Agree, Agree, No Strong Opinion, Disagree, Strongly Disagree
I'd rather take my chances with higher risk investments than increase the amount I'm saving.	Strongly Agree, Agree, No Strong Opinion, Disagree, Strongly Disagree
I'm concerned by the volatility of stock market investments.	Strongly Agree, Agree, No Strong Opinion, Disagree, Strongly Disagree