



Risk score questionnaire

How do you rate your understanding of investing?

☐ Little ☐ Ok ☐ Excellent

What is your date of birth?

Date of birth



How would you classify your income sources and overall financial situation?

☐ Unstable ☐ Somewhat stable ☐ Very stable

What is your estimated annual net income? ⓘ

Annual income

<= \$10,000

\$10,001 - \$25,000

\$25,001 - \$40,000

\$40,001 - \$45,000

\$45,001 - \$50,000

\$50,001 - \$100,000

\$100,001 - \$150,000

\$150,001 - \$200,000

\$200,001 - \$250,000

\$250,001 - \$500,000

\$500,001 - \$1,000,000

> \$1,000,000

What is your estimated liquid net worth? ⓘ

Liquid net worth

<= \$5,000

\$5,001 - \$20,000

\$20,001 - \$50,000

\$50,001 - \$75,000

\$75,001 - \$100,000

\$100,001 - \$250,000

\$250,001 - \$500,000

\$500,001 - \$1,000,000

\$1,000,001 - \$5,000,000

> \$5,000,001

Current risk score

We need to be sure any investment you make is suitable for you by working out a risk score. ⓘ

Risk score preview

Your risk score preview will appear here.

Risk score

A **risk score** is a number from ⓘ (least risky) to ⓘ (most risky) that is assigned to your account. It is set once you take our risk questionnaire. You can get to the questionnaire by going to the menu on the top right hand corner. Each risk score is represented by a color. More background [here](#) ↗.

You should take the questionnaire as soon as your account is open. You must retake it at any time in the future if there is any change in your financial situation or priorities, that can in turn change your answers.

Each portfolio is also assigned a risk score by us. You will only be able to invest in portfolios with a risk score that is the same or lower than that of your account.

If you have not taken our risk questionnaire then there is a helpful reminder in the **First steps** section.

Once you have a risk score assigned to your account, you will see it on the right hand side of the header on this page. You can click on it to go to the risk questionnaire.

For your account:

What percentage of your liquid net worth will you invest through us?

- ☐ Less than 20% ☐ 21% to 40% ☐ 41% to 60% ☐ More than 60%

When do you need to use the capital you invest through us?

- ☐ No specific time ☐ 3 to 5 years ☐ 1 to 2 years ☐ This year

Risk attitude

Select the option that best describes your attitude towards the trade-off between risk and return for this account.

- ☐ Risk-averse - Loss is more important than return
- ☐ Risk-neutral - Loss and return are equally important
- ☐ Risk-taker - Return is more important than loss

Stock drop reaction

If a substantial portion of your investments were securities and the stock market experienced a significant drop in value during a market decline (e.g., over 10% in a month), what would you do? (If you have already experienced a significant value drop in your investments, select the answer that corresponds to the actual action you took).

- ☐ Sell all remaining investments
- ☐ Sell a portion of my remaining investments
- ☐ Hold onto or buy more of the investment

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