



Risk Attitude Profiling Questionnaire

This document should be used to record your answers to the Risk Attitude Profiling Questionnaire. It allows your financial adviser to complete the online risk questionnaire at a later date.

Basic Information

Title	Mr ☐	Mrs ☐	Miss ☐	Ms ☐	Other (please specify)							
Forename(s)												
Surname												
Date of birth								Chosen Retirement Age				
Signed					Date							

Questions

There are twelve statements. Please score each statement on how closely it resembles your current situation, attitudes and feelings.

1 People who know me would describe me as a cautious person

Strongly agree	☐	Agree	☐	No strong opinion	☐
Disagree	☐	Strongly disagree	☐		

2 I feel comfortable about investing in the stockmarket

Strongly agree	☐	Agree	☐	No strong opinion	☐
Disagree	☐	Strongly disagree	☐		

3 I generally look for safer investments, even if that means lower returns

Strongly agree	☐	Agree	☐	No strong opinion	☐
Disagree	☐	Strongly disagree	☐		

4 Usually it takes me a long time to make up my mind on investment matters

Strongly agree	☐	Agree	☐	No strong opinion	☐
Disagree	☐	Strongly disagree	☐		

5 I associate the word “risk” with the idea of “opportunity”

Strongly agree	☐	Agree	☐	No strong opinion	☐
Disagree	☐	Strongly disagree	☐		

6 I generally prefer bank deposits to riskier investments

Strongly agree	☐	Agree	☐	No strong opinion	☐
Disagree	☐	Strongly disagree	☐		

7 I find investment matters easy to understand

Strongly agree	☐	Agree	☐	No strong opinion	☐
Disagree	☐	Strongly disagree	☐		

8 I’m willing to take substantial investment risk to earn substantial returns

Strongly agree	☐	Agree	☐	No strong opinion	☐
Disagree	☐	Strongly disagree	☐		

9 I’ve little experience of investing in stocks, shares, or investment funds

Strongly agree	☐	Agree	☐	No strong opinion	☐
Disagree	☐	Strongly disagree	☐		

10 I tend to be anxious about the investment decisions I’ve made

Strongly agree	☐	Agree	☐	No strong opinion	☐
Disagree	☐	Strongly disagree	☐		

11 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	☐		

12 I’m not comfortable with the ups and downs of stockmarket investments

Strongly agree	☐	Agree	☐	No strong opinion	☐
Disagree	☐	Strongly disagree	☐		

Further Information

Further information on the underlying methodology used in the risk questionnaire is available in the leaflet **A guide to our Risk Attitude Profiling Questionnaire**. Details are also available at royallondon.com/pensioninvestments

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