

MY/OUR INVESTMENT POLICY
Print, complete, and bring to your meeting.

Investment Philosophy

Attitude toward risk (Check only one)

- Conservative
(willing to assume only limited risk)
- Average
(willing to assume moderate level of risk)
- Aggressive
(risk tolerance is very high)
- Overall, I rate my tolerance toward risk as
(1-10 with 1 = risk avoider and 10 = risk taker)

You	Spouse
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Investment Philosophy

(Check only one)

- Very conservative and more interested in conserving capital than in making it grow. Willing to accept moderate income and nominal capital gains potential in exchange for relatively lower risk.
- Interested only in high-quality investments and will be quite satisfied with a reasonable current return and some growth potential. Can tolerate risk that accompanies growth potential.
- Liberal cash return with a chance for capital appreciation. Willing to accept risk of losing money on investments.
- Can accept a lower level of income now in order to aim for capital appreciation and growth of income in the future. Willing to accept a higher risk of losing money on investments.
- Willing to accept relatively high risks in exchange for possibility of above-average capital gains and appreciation.

You	Spouse
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