

CREATIVE FINANCIAL SERVICES---RISK TOLERANCE FORM

CLIENT(S): (A) _____ (B) _____ (X) BOTH CONCUR

Risk Tolerance Questionnaire

Answer the following questions to determine your Risk Tolerance.

1. How important is capital preservation?

Not at all 1 2 3 *Moderately important* 4 5 6 7 *Very important* 8 9

2. How important is growth?

Not at all 1 2 3 *Moderately important* 4 5 6 7 *Very important* 8 9

3. How important is low volatility?

Not at all 1 2 3 *Moderately important* 4 5 6 7 *Very important* 8 9

4. How important is inflation protection?

Not at all 1 2 3 *Moderately important* 4 5 6 7 *Very important* 8 9

5. How important is current cash flow?

Not at all 1 2 3 *Moderately important* 4 5 6 7 *Very important* 8 9

6. How much risk are you willing to take to achieve a higher return?

None at all 1 2 3 *A moderate amount* 4 5 6 7 8 *A lot* 9

Please download and print this form and provide to CFS as requested. Please use one of the above letters and write that letter over the most appropriate circle for each question. Please complete only one "circle" for each question. If a couple differs on one or more responses, please indicate using the (A) and (B) nomenclature as is appropriate or complete a separate form for each partner.